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Associates  
Great Falls  
transportation  
plan, 1964-1981

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# ECONOMIC AND POPULATION STUDIES TO 1981



FOR  
THE GREAT FALLS CITY-COUNTY PLANNING BOARD  
AND  
THE MONTANA STATE HIGHWAY COMMISSION  
PLANNING SURVEY DIVISION  
IN COOPERATION WITH  
THE U.S. DEPARTMENT OF COMMERCE  
BUREAU OF PUBLIC ROADS





SUMMARY

The Great Falls Metropolitan Area can face its future with the knowledge that its economy can be expected to grow at a steady rate. The Metropolitan Area serves the north central Montana area as the major trade and service center for the region. In addition, it enjoys a role as a small but important manufacturing center on both a national, regional and local scale; it is a stable producer of agricultural commodities, particularly wheat and livestock; it is an important business and financial center serving its region; and in recent years it has benefited from large scale military expenditures as the geographic location for Malmstrom Air Force Base and the Minuteman Missile Complex.

If the question were asked as to whether the area can expect an influx of large and important industry, the answer is "no." No large-scale manufacturing or non-manufacturing industry can be foreseen although it is not completely ruled out as a possibility. Rather, the Metropolitan Area can expect steady and moderate increases in most labor force categories with the exception of agriculture, which is expected to decline. The most promising industrial growth areas are in food and kindred products, where there is a potential for more industrial growth utilizing the agricultural resources produced in the region.

For the most part, the Great Falls Metropolitan Area can be expected to continue its major role as the trade and service center for its trade areas. Manufacturing, although not a dynamically growing industry, will still be important as a source of export income as will trade, services, agriculture, and the military.

In conclusion, the County can be expected to increase in employment from 24,184 in 1960 to a low range of 38,000 and a high range of 39,200 in 1981 - an increase ranging from 57 to 62 percent. With employment growth as the base, population can be expected to increase to a low of 118,750 and a high of 122,500 with a probable estimate of 120,625. This represents a 64 percent increase in population over 1960. The Great Falls urban study area is expected to increase in population to 110,000, which represents a 72 percent increase over 1960.

## INTRODUCTION

This report represents one of the phases of the Great Falls-Cascade County Metropolitan Area Transportation Study. This study was initiated in 1961 by the City of Great Falls, Cascade County, the Montana Highway Commission, and the U. S. Bureau of Public Roads with the purpose of planning the long-range transportation needs of the Great Falls Metropolitan Area.

With the passage of the Federal Aid Highway Act of 1962, the Secretary of Commerce was authorized to withhold federal funds for highway projects in urban areas of more than fifty thousand population unless such projects were based upon a "continuing, comprehensive transportation planning process carried on cooperatively by States and local communities." One of the principal requisites of this transportation planning process was the emphasis upon the economic base of the community; how the community makes its living and what influence the community's economy will have upon future growth.

The target date that was selected for future planning purposes was 1981. All past trends pertaining to the local, state, and national economy, as well as present developments and expected future trends, were charted and a balance sheet of plus and minus factors was developed. On this basis the labor force that comprises the various industries (i.e., trade, agriculture, manufacturing, services, government) in the Metropolitan Area was projected to 1981 and from this a 1981 population estimate was derived.

The main purpose of the economic study and its end result, the projection of population, is to arrive at a population estimate that is independent of the demographic approach (i.e., comparing Cascade County with the State, the Mountain Region, and the United States). It is through a "hard-nosed" look at the economy that the most realistic estimates of future growth can be made. This is due to the fact that only job opportunities will keep people in an area and attract people from other areas. Conversely, it is the lack of job opportunities that causes people to migrate elsewhere, which results in an area of declining population.

## DATA SOURCES AND METHODOLOGY

Early in the course of this study it was decided that employment would be the basis of analysis and the projection of



the economy. The reasons for this are that employment data has the continuity of tracing past trends back to at least 1920 and that various studies of the national economy along with the various state economies also use employment as the basis for analysis and projection. Thus it was possible for the economic study in the Metropolitan Area to be correlated with state, regional, and national trends and forecasts.

The major source of data utilized in the study was from the Census of Population which contained the breakdown on the employed labor force for every decennial census year. Local data supplied by the Great Falls Office of the Unemployment Compensation Commission of Montana did not cover employment prior to 1950. In addition, the Commission's figures were based on fiscal year estimates and did not cover proprietors and self-employed, which also made comparison with the Census difficult.

Other major sources of data included the various U. S. Bureau of the Census publications on agriculture, wholesale and retail trade, and manufacturing, supplemented wherever possible by local and state data.

Since the economic study is oriented to the Great Falls Transportation Study area which includes most of Cascade County's population, the description and projection of the economy in the following sections utilizes Cascade County (coextensive with the Great Falls Standard Metropolitan Statistical Area) as the basis for analysis. Wherever it was deemed necessary to separate Great Falls from the rest of the County, this was done, in order to show the importance of Great Falls in a particular phase of the economy.

Employment projections were based, for the most part, on trade area information and the ratio method. Past trends were compared for each industry based upon Cascade County's proportionate share with that of the State of Montana. The State's past and future employment estimates were also compared with projections for the United States made by the National Planning Association. Since the National Planning Association also projected employment for the State of Montana, by industry, for 1976, it was possible to extrapolate this trend to 1981 by assuming the same rate of growth. Our interest in the National Planning Association projections for 1976 employment was in growth rate rather than in absolute numbers of employees since this took into account changing technological requirements which have a definite bearing upon employment requirements.

An additional source utilized in the employment projections was the personal interview data. Here it was possible to draw on first-hand information from Cascade County businessmen and executives as to what their future plans called for in terms of growth and expansion, remaining status quo, or declining.

The Montana State Highway Commission furnished the aerial photograph and several base maps utilized in this report. We wish to express our appreciation for their complete cooperation throughout this study.

## PHYSICAL BACKGROUND OF THE GREAT FALLS-CASCADE COUNTY AREA

### Introduction

Since its founding in 1882 by Paris Gibson, Great Falls has been the trading and commercial center for a large area that includes most of north-central Montana. It assumed its role as a manufacturing center for silver, copper, and zinc smelting due to its location along the Missouri River at Black Eagle Falls which provided abundant and cheap electric power, a major locational factor in smelting operations.

The railroads also played an important part in the economic development of the Great Falls area. The extensions of the Great Northern Railway and the Chicago, Milwaukee, St. Paul & Pacific Railway to Great Falls in 1887 and the subsequent extension of the Great Northern to Helena and Butte where extensive mining operations were underway provided Great Falls with access to the ore-producing areas. Thus Great Falls was able to effectively capitalize on its transportation and power resources and emerge as an industrial city centered around smelting. Other early industrial developments included flour milling and meat packing, and by 1890 Great Falls could point to a population of almost 4,000 persons.

During this same early period of development, agriculture was also important economically. The southern and eastern portions of Cascade County were settled by stockgrowers during the 1880's and with the completion of the railroad through Cascade County in 1888 the more desirable agricultural lands had already been settled. Other agricultural areas in the northwestern part of the County near Ft. Shaw were not opened for settlement until after the completion of irrigation canals by the U. S. Reclamation Service in 1908.

The unlimited water and power resources have been the major factors in the growth and development of Great Falls. There are five hydro-electric plants now in operation in the area. The Black Eagle Dam was built in 1891 and was reconstructed in 1927. The Rainbow Dam was built in 1908 followed by the Ryan Dam, the Morony Dam, and the Cochrane Dam which was completed in 1958. These plants have a total capacity of over 400,000 horsepower. Due to the development of high voltage transmission lines, it is possible for the City to receive an unlimited volume of electric power.



The supply of water to the City from the Missouri River is also unlimited. The water is unusually pure and almost free of minerals and contamination.

In 1889, Great Falls was selected by the Boston and Montana Consolidated Copper and Silver Mining Company as the site for a new copper reduction plant. This plant was completed in 1892 and was the main source of employment in the area. The Anaconda Copper Mining Company acquired this copper reduction plant in 1910. In 1916 it was replaced by modern electrolytic copper and zinc refineries. A wire and cable mill and a ferro-manganese plant were also added at this time. As the operation progressed and expanded, new metal markets were entered and many more additions were made. They added a rare minerals mill in which radium, cadmium, indium and germanium were produced. In 1955 Anaconda started production in its new aluminum rolling mill. At that time, due to the firm's continued diversification, they decided to drop the word "copper" from their name and today it is the Anaconda Company.

Oil and natural gas fields to the north of Great Falls have contributed to the growth of the City. There are 20 oil fields in this region that contain about 3,000 producing wells with an approximate production of 184,000,000 barrels of oil.

The large flour mills of the Montana Flour Mills Company and General Mills, Inc. were constructed as the production of grain increased in the Great Falls area. In these mills the thousands of bushels of wheat harvested each year are converted into flour and other products. The major product is flour for commercial bread baking. The Montana Flour Mills Company also operates an automated feed plant which produces high-quality formula feeds. These two companies have a combined wheat storage capacity of 2,300,000 bushels.

### Physical Characteristics

Cascade County is bordered on the south by the Big Belt and Little Belt Mountains and on the east by the Highwood Mountains. Its physiography is characterized by isolated mountain groups separated by low divides and basins. These mountain groups rise several thousand feet above the basins and rolling plains. The major portion of the County covers a transitional area between these mountain groups and the rolling plains.

### Drainage

The County is drained by the Missouri River and its tributaries; the Sun, Smith, and Dearborn Rivers, and Belt Creek. The Missouri flows diagonally through the County in a southwest to northeast direction. In the Big Belt Mountains the river has many rapids and cascades. As it flows northward it meanders through a sandy valley 1 to 2½ miles wide to the mouth of the Sun River. At Great Falls the Missouri enters a sandstone gorge and within 10 miles of the City drops more than 500 feet in a series of falls and rapids.

The Sun River, a major tributary to the Missouri, has its headwaters along the Continental Divide and flows in an easterly direction until it enters the Missouri at Great Falls. The Sun has a number of tributaries which are intermittent streams. Simms Creek is the largest tributary which enters the Sun from the south. Those streams entering the Sun from the north include Big Coulee, Mill Coulee, and Little Muddy Creek, all of which are intermittent.

The Smith River drains the south central part of the County and enters the Missouri near Ulm. It flows in a north-northwest direction and it is joined by its main tributary, Hound Creek, in the south central part of the County.

### Climate

Lying in the Central Plains Region and east of the Continental Divide, Cascade County has a semi-arid climate. As one goes from the higher to the lower elevations in the County, precipitation decreases, with the higher elevations enjoying comparatively more rainfall. Comparatively low precipitation prevails in the northwestern part of the County with increasing amounts to the south and east on the plateaus and foothills. The average annual precipitation for the area around Great Falls is approximately 14 inches. Most of the precipitation occurs from late March or early April through September, with an average of about 9½ inches for that period. The average frost-free growing season in the County is about 135 days.

### Soils

Cascade County has several soil sub-types which vary with the elevation. Soils classified according to color belong to several groups: grayish brown, dark grayish brown, very dark

grayish brown, and black. The farm lands in the County are found largely in those areas covered with the dark grayish brown and very dark grayish brown soils while the better grazing districts are found in the very dark grayish brown and black soil areas.

Among the major soil series found in the County are the Morton, Teton, Scobey, Laurel and Blaine loams.

The Morton silt loams are among the more important agricultural soils of the County. These loams were placed under cultivation largely at the time of settlement of the dry-land areas in 1906. The Morton silt loams have good surface drainage and are devoted mostly to spring and fall wheat. Other loam varieties in the Morton series are cultivated in small grains or used as grazing land. The Morton silt loams are generally found in the rolling sandstone benches along the Sun, Missouri and Smith Rivers.

Clay loams in the Morton series around Crown Butte and along the Sun River are utilized mostly for grazing land. This is due to the fact that the clay loams are poorly drained and hence not too suitable for farming purposes. Other clay loam areas are found in the central part of the County west of the Smith River.

Other sub-types within the Morton series are the sandy loams found on the rolling upland tracts along the Missouri River and in the central part of the County, and along the Sun River in the west-central part of the County. Small grains and spring wheat are generally cultivated on these soils. Other sub-types include gravelly loams with a mixed type of use in grain crops and grazing; and stony loams with fairly good grazing capacity. The Morton series is the largest single soil group in the County, comprising almost 22% of the total land area.

Another major soil in the County is the Teton group which includes sub-types such as the Teton loams that extend along the higher portion of the plateau north of the Little Belt Mountains and the benches extending out from the Highwood Mountains. Many large stock ranches were originally located on these loams but after 1910 the areas with tillable land began to be cultivated in spring and winter wheat.

Teton silt loams found along the gently rolling plateaus below the Little Belt Mountains and on the high rolling tracts in the east-central part of the County are devoted to spring and winter wheat, forage crops, and extensive livestock grazing.



Teton stony loams which cover the higher and steeper slopes of the plateaus below the Big and Little Belt Mountains in the southern part of the County are mostly classified as non-tillable grazing land with some areas devoted to small grain cultivation. This soil supports some of the best grazing land in the County.

The Scobey group of soils, found in the area east and south of Benton Lake, was originally cultivated in about 1906. Wheat growing predominates in this area, followed by small grains and livestock grazing. Generally, the soils in the Scobey group are very productive and comprise some of the better farming districts in the County.

The soils developed over recent stream deposits are grouped in the Laurel and Choteau series. The Laurel group of soils is generally under cultivation where the land is sub-irrigated. The Choteau series includes a group of undifferentiated stony soils covering poorly drained stream valleys below the mountains which are valuable as wild-hay lands.

Soils of the Joplin series are found chiefly in the north-eastern part of the County. The Joplin soils, although suitable for farming, are among the marginal agricultural soils in the County.

The soils of the County are grouped into 26 soil series and soil types and phases. The following table gives the area in square miles of each soil type and physiographic feature, and also the proportion of each soil type according to topography.



AREA AND PROPORTIONATE EXTENT OF EACH SOIL TYPE IN CASCADE COUNTY

<u>Soil Type</u>	<u>Total Area</u>		<u>Topography</u>	
	<u>Square Miles</u>	<u>% of County</u>	<u>Level to Sharply Rolling</u>	<u>Sharply Rolling</u>
Adel				
Adel Loams	19.7	0.7	19.7	0.0
Adel Stony Loams	15.6	0.6	15.0	0.6
Adel Stony Loams-Timbered Phase	34.7	1.3	0.0	34.7
Ashuelot				
Ashuelot Gravelly Silt Loams	20.4	0.7	20.4	0.0
Bainville				
Bainville Loams	4.3	0.1	1.3	3.0
Beaverton				
Beaverton Gravelly Loams	13.3	0.5	13.3	0.0
Blaine				
Blaine Stony Loams	116.3	4.2	31.0	85.3
Blaine Stony Loams-Dark Brown Phase	22.6	0.8	12.5	10.1
Cheyenne				
Cheyenne Gravelly Loams	9.6	0.4	9.6	0.0
Choteau				
Choteau Loams	37.4	1.3	37.4	0.0
Fairfield				
Fairfield Gravelly Loams	26.5	1.0	26.5	0.0
Gerhard				
Gerhard Clay Loams	7.2	0.3	7.2	0.0
Joplin				
Joplin Loams	32.6	1.1	13.0	19.6
Joplin Fine Sandy Loams	16.2	0.6	16.2	0.0
Joplin Silt Loams	16.7	0.6	16.7	0.0
Joplin Silty Clay Loams	5.2	0.2	5.2	0.0
Laurel				
Laurel Loams	142.2	5.2	142.2	0.0
Laurel Clay Loams	26.9	1.0	26.9	0.0
Lismas				
Lismas Clay Loams	9.9	0.4	0.0	9.9
Lloyd				
Lloyd Gravelly Loams	22.0	0.8	20.3	1.7
Lowry				
Lowry Gravelly Loams	20.6	0.7	12.9	7.7
Marias				
Marias Clay Loams	31.7	1.2	31.7	0.0
Morton				
Morton Clay Loams	7.0	0.3	7.0	0.0
Morton Clay Loams-Shallow Phase	7.5	0.3	7.5	0.0
Morton Gravelly Loams	53.1	1.9	53.1	0.0
Morton Gravelly Loams-Dark Phase	4.0	0.1	4.0	0.0
Morton Gravelly Loams-Red Phase	10.1	0.4	10.1	0.0
Morton Gravelly Loams-Shallow Phase	42.1	1.5	42.1	0.0

Morton Sandy Loams	21.2	0.8	21.2	0.0
Morton Sandy Loams-Shallow Phase	8.6	0.3	8.6	0.0
Morton Silt Loams	161.1	5.8	158.6	2.5
Morton Silt Loams-Dark Phase	36.5	1.3	35.0	1.5
Morton Silt Loams-Dark Red Phase	19.0	0.6	19.0	0.0
Morton Silt Loams-Red Phase	53.0	1.9	51.6	1.4
Morton Silty Clay Loams-Shallow Phase	8.3	0.3	8.3	0.0
Morton Stony Loams	31.7	1.2	22.8	8.9
Morton Stony Loams-Red Phase	101.3	3.7	24.9	76.4
Morton Stony Loams-Shallow Phase	19.4	0.7	5.9	13.5
Orman				
Orman Clay Loams	19.7	0.7	19.7	0.0
Phillips				
Phillips Silt Loams	22.0	0.8	22.0	0.0
Phillips Sandy Loams	6.2	0.3	6.2	0.0
Pierre				
Pierre Clay Loams	54.6	2.0	16.2	38.4
Power				
Power Clay Loams	2.0	0.0	2.0	0.0
Scobey				
Scobey Loams	39.2	1.4	33.2	6.0
Scobey Loams-Dark Phase	11.6	0.4	11.6	0.0
Scobey Coarse Sandy Loams	16.5	0.6	16.5	0.0
Scobey Sandy Loams	30.2	1.1	27.6	2.6
Scobey Silt Loams	80.9	2.9	69.7	11.2
Scobey Silt Loams-Dark Phase	11.6	0.4	11.6	0.0
Scobey Clay Loams-Dark Phase	17.7	0.6	17.7	0.0
Scobey Stony Loams	0.6	0.0	0.0	0.6
Teton				
Teton Clay Loams-Dark Red Phase	2.0	0.1	2.0	0.0
Teton Loams	5.7	0.2	5.7	0.0
Teton Silt Loams-Dark Red Phase	86.8	3.1	86.8	0.0
Teton Stony Loams	236.2	8.6	69.7	166.5
Teton Stony Loams-Dark Red Phase	22.7	0.8	22.7	0.0
Wade				
Wade Silty Clay Loams-Dark Phase	13.7	0.5	13.7	0.0
Winifred				
Winifred Clay Loams	4.6	0.2	1.1	3.5
Zortman				
Zortman Loams	104.1	3.8	29.1	75.0
Zortman Loams-Deep Phase	3.6	0.1	3.6	0.0
Zortman Gravelly Loams	4.1	0.2	4.1	0.0
Zortman Gravelly Loams-Shallow Phase	8.1	0.3	8.1	0.0
Physiographic Features				
Badlands	0.6	0.0	0.0	0.6
Badland Basins	1.9	0.0	1.9	0.0
Mountains	699.0	25.6	0.0	699.0
Rock Outcrops	6.8	0.2	0.0	6.8
Swamps	0.4	0.0	0.4	0.0

Source: L. F. Gieseke, Soils of Cascade County, Bulletin No. 337, Montana State College, Agricultural Experiment Station, Bozeman, Montana, March, 1937.

## Water

Although the Great Falls area is located in a semi-arid region with average annual precipitation of 14 inches, water is in plentiful supply. The City, which comprises the major share of Cascade County's population, utilizes the Missouri River for its water supply. Approximately 48 million gallons per day can be handled by the City's filtration plant while the total rated capacity of the pumping station is 102 million gallons per day.

Water has also played an important part in the industrial development of the area. The availability of hydro-electric power from the falls of the Missouri River encouraged the construction of the Black Eagle, Rainbow, Ryan, Morony and Cochrane Dams.

## Transportation

Cascade County, with Great Falls as its focal point, is an important rail transportation center. The Great Falls area benefits from its location on the Havre-Butte branch of the Great Northern which traverses the County from northeast to southwest and connects with the Northern Pacific at Helena and Butte. The Sunburst-Shelby and Great Falls branch of the Great Northern, which was originally constructed as a narrow gauge during the 1890's, was later made standard gauge and extended to Billings around 1907. This branch has connections with the Canadian Pacific at Sunburst and with the Burlington at Billings.

The Great Falls area is also served by a branch line of the Chicago, Milwaukee, St. Paul and Pacific Railway which was built around 1912. Today this line hauls only freight.

Other transportation includes four scheduled airlines; Western, Northwest, Frontier and West Coast Airlines; twelve truck lines; and two bus lines.

The Metropolitan Area has good highway access with the rest of the State. U. S. Highway 87 enters the County in the northeast, connecting Great Falls with Fort Benton and Havre, and leaves the County in the southeast, connecting Great Falls with Billings via Lewistown. U. S. Highway 89, the old Yellowstone-Glacier Park Trail, enters the County southeast of Neibart and leaves it in the northwest connecting Great Falls with Glacier National Park. The other major north-south route is U. S. Highway 91 (Interstate 15) which connects Great Falls with the Canadian province of Alberta and then extends southwestward to Helena and Butte.



## II

THE ECONOMIC BASE OF CASCADE COUNTYEmployment and Population Growth

Cascade County has exhibited a strong growth rate in employment and population between 1940 and 1960. The County's growth in these two economic indicators was exceeded by the growth in Great Falls. Between 1940 and 1960 Cascade County increased by 75 percent in population and by 60 percent in employment. For the same period, the City of Great Falls had an increase of 85 percent in population and 75 percent in employment. It is interesting to note that this growth rate exceeded that of both the State of Montana and the United States. Montana's growth was 21 and 25 percent in population and employment, respectively, while the United States experienced a 36 percent increase in population and a 43 percent increase in employment.

Table 1

COMPARATIVE POPULATION AND EMPLOYMENT TRENDS - 1940-1960  
GREAT FALLS, CASCADE COUNTY, MONTANA AND UNITED STATES

	<u>Great Falls</u>		<u>Cascade County</u>		<u>Montana</u>		<u>United States</u>	
	<u>Pop.</u>	<u>Employ.</u>	<u>Pop.</u>	<u>Employ.</u>	<u>Pop.</u>	<u>Employ.</u>	<u>Pop.</u>	<u>Employ.</u>
1940	30	11	42	15	559	185	131,669	45,070
1950	39	15	53	20	591	218	151,326	56,435
% Increase								
1940-1950	31.0	38.1	26.2	31.1	5.6	18.1	14.9	25.2
1960	55	19	73	24	675	231	179,323	64,639
% Increase								
1950-1960	41.2	26.6	38.4	22.5	14.2	6.0	18.5	14.5

Population and Employment figures in 000's.

Source: U. S. Department of Commerce, Bureau of the Census, General Social and Economic Characteristics, Montana and United States Summary, 1960.

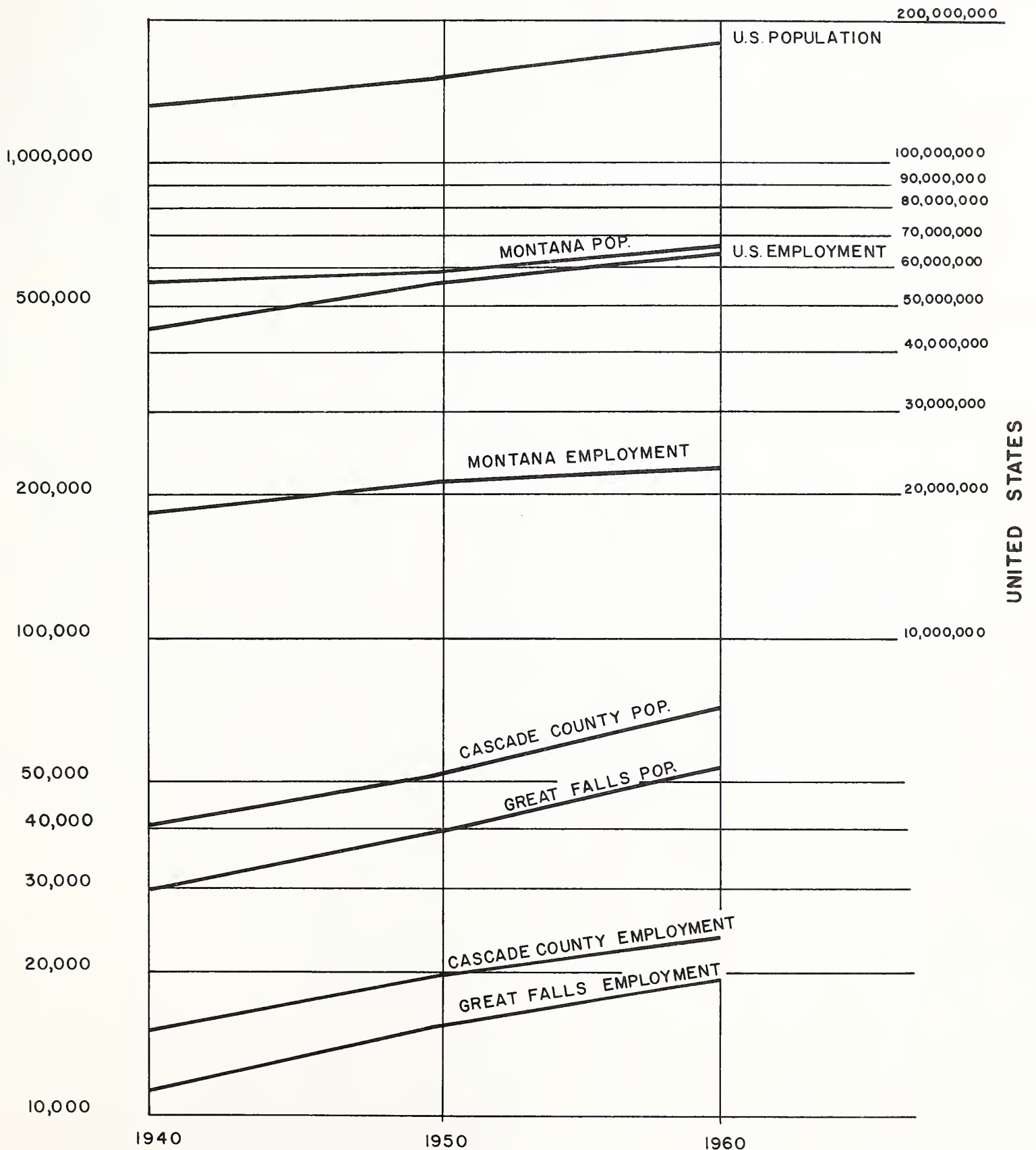


The growth trends for Great Falls and Cascade County between 1940 and 1950 and between 1950 and 1960 show different characteristics. Between 1940 and 1950 the growth in population was exceeded by the growth in employment in the City and in the County. During the 1950-1960 period this trend was reversed with the growth in population exceeding the growth in employment. This is best explained by two factors. First, national, state and local trends showed that between 1940 and 1950 the labor participation rate (the proportion of the population that is employed) increased while between 1950 and 1960 the labor participation rate decreased. This means that the number of people employed in 1960 were supporting more non-working persons than they were in 1950.

Second, employment as defined in this study corresponds to the Census's term "employed" which includes civilians and excludes those who are unemployed and those who are in the armed forces. Thus back in 1960, approximately 4,100 military personnel were not counted in the employed labor force although they and their dependents were counted in the population.

# COMPARATIVE POPULATION & EMPLOYMENT TRENDS: 1940-1960

## UNITED STATES, MONTANA, CASCADE COUNTY & GREAT FALLS



SOURCE: U.S. DEPT. OF COMMERCE, BUREAU OF THE CENSUS, 1940—1960

## The Labor Force and its Changing Composition

The best way to describe how the Metropolitan Area earns its livelihood is to show employment figures by industrial groups. In terms of employment, the largest single industry is wholesale and retail trade, which employs 5,731, or almost 24 percent of the employed labor force. The second largest industrial sector in terms of employment is services (business and repair services, medical and other health services, educational services, professional and related services). This group employs 5,698 and comprises slightly more than 23 percent of the employed labor force. Manufacturing comes next with 3,260 employees or 13.5 percent of the total, followed by transportation, communications and utilities with 2,296 employees or 9.5 percent of the total.

Since 1940, Cascade County has experienced definite changes in its industrial composition. Agriculture has been the only industrial sector to show both an absolute and a relative decline. Wholesale and retail trade, although increasing in absolute employment from 1940 to 1950 and from 1950 to 1960, declined slightly in relative importance from 1950 to 1960. Employment in services declined in absolute numbers for each period but between 1950 and 1960 increased slightly in relative position. Manufacturing, which increased by almost one-third between 1940 and 1960, actually declined relatively from 16.3 percent of total employment to 13.5 percent.

The fastest growing industrial sectors of employment since 1940 have been construction, with almost a 200 percent increase; public administration, also with practically the same increase; and finance, insurance and real estate, with almost a 120 percent increase. Each one of these industrial sectors has also increased in its relative position of total employment. Table 2 shows each industrial sector and its relative growth between 1940 and 1960 while Figure 2 shows the growth graphically.

# PERCENT COMPARISON OF INDUSTRY GROUP FOR CASCADE COUNTY 1940, 1950, 1960

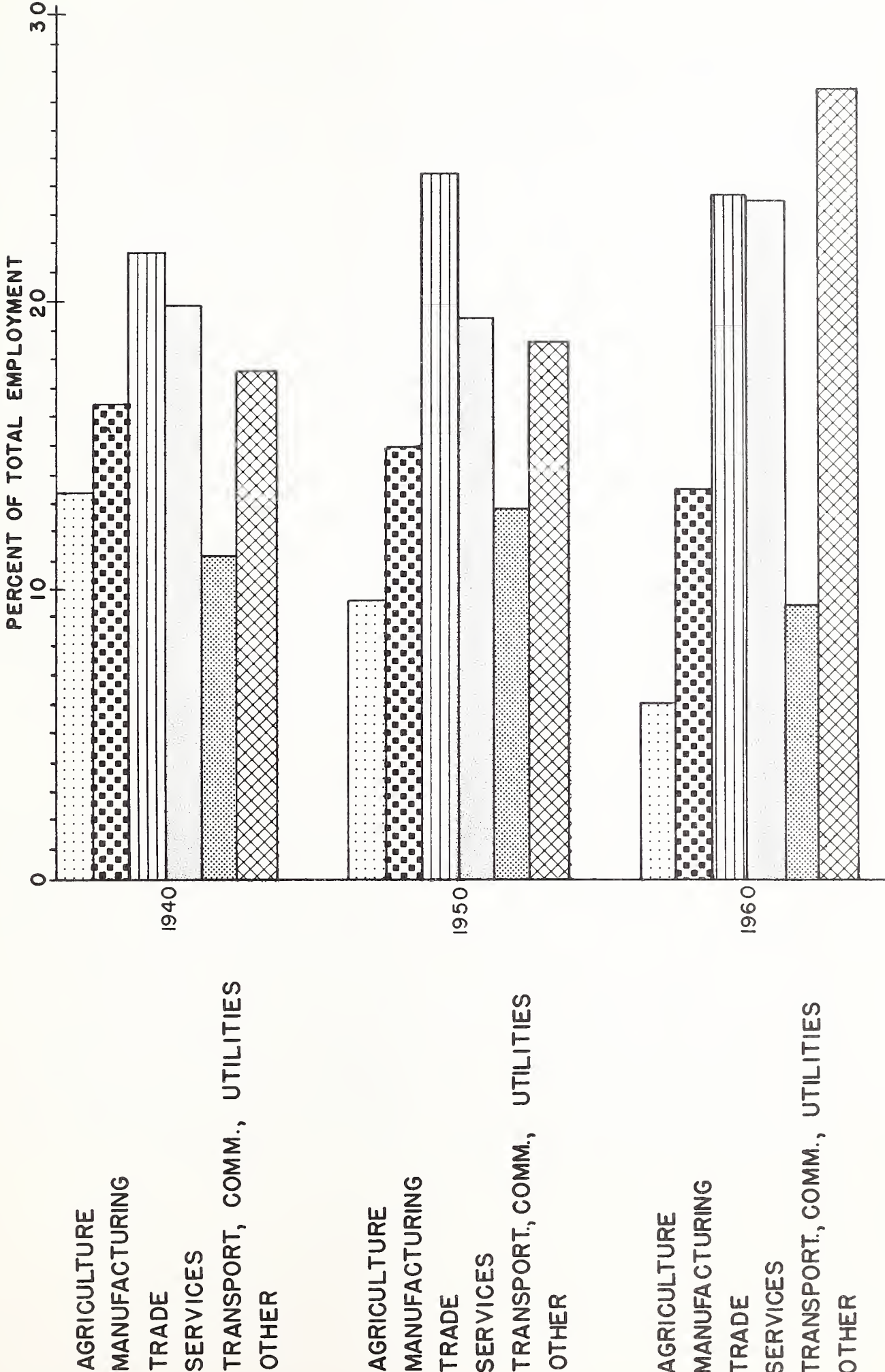




Table 2CASCADE COUNTY: INDUSTRY GROUP OF EMPLOYED - 1940, 1950 & 1960

Industry Group	1940	% of Total	1950	% of Total	1960	% of Total
Employed	15,051	100.0	19,742	100.0	24,184	100.0
Agriculture	1,995	13.3	1,918	9.5	1,487	6.1
Forestry & Fisheries	34	0.2	16	0.1	21	0.1
Mining	563	3.7	122	0.6	121	0.5
Construction	697	4.6	1,457	7.4	2,078	8.6
Manufacturing	2,457	16.3	2,935	14.9	3,260	13.5
Trans., Commun., & Util.	1,672	11.1	2,505	12.7	2,296	9.5
Wholesale & Retail Trade	3,284	21.8	4,837	24.5	5,731	23.7
Finance, Ins. & Real Est.	560	3.7	766	3.9	1,257	5.2
Services	2,973	19.9	3,864	19.6	5,698	23.6
Public Administration	541	3.6	1,042	5.3	1,601	6.6
Industry Not Reported	275	1.8	280	1.5	634	2.6

Source: U. S. Department of Commerce, Bureau of the Census, Census of Population, Montana, 1940-1960.

Estimated County Employment for 1964

From trends compiled by the Montana State Employment Service and the U. S. Bureau of Labor Statistics it is estimated that the year-end employment figure for 1964 approximated 26,200, an increase of over 8 percent since 1960. Those industries staying about status quo with 1960 included manufacturing, transportation, communications and utilities, and wholesale and retail trade. Industries showing gains since 1960 included construction, services, finance, insurance and real estate, and public administration. Although the estimates provided by the State Employment Service and the Bureau of Labor Statistics comprised non-agricultural employment only, it is estimated that, based upon past trends, agricultural employment declined since 1960.

### Characteristics of the Economy

The Great Falls Metropolitan Area has historically derived its income from three major sources of economic endeavor. It is the major shopping and service center not only for Cascade County but for several counties in its regional trade area; it is a manufacturing center whose products in primary metals and agricultural grains are shipped to various parts of the country; and it has a productive agricultural economy principally comprised of livestock raising and dry-land grain farming.

In recent years military installations such as Malmstrom Air Force Base have assumed greater importance. This is chiefly due to the heavy emphasis placed upon the Minuteman missile complex centered in north-central Montana and administered from Malmstrom Air Force Base.

The economic base of Cascade County can be defined as the sum total of those income opportunities located in the area. These income or employment opportunities are of two types. People residing in the area spend money for goods and services, while other goods and services are exported outside of the local area. Those employed in selling goods and services to the local market are referred to as secondary or service employment, while those engaged in exporting goods and services outside the community are called primary or basic employment.

It is the primary or basic employment that is the principal mover of the economy. Thus the growth or decline of sales and employment in the primary area is largely independent of changes in local income, while the sales and employment in the secondary industries are directly affected by changes in local income. In the final analysis an area will grow in population as more job opportunities are created both by expansion of existing industry and by location of new industry.

From interview and questionnaire data compiled between the last quarter of 1964 and the second quarter of 1965, along with comparisons of the County's labor force by industry group with the State and the United States, it was possible to break down the 1960 labor force into primary and secondary classifications. Following is a table showing 1960 primary or basic employment.

Table 3

<u>BASIC EMPLOYMENT IN CASCADE COUNTY FOR CENSUS YEAR 1960</u>	
<u>Industry</u>	<u>No. of Basic Employees</u>
Agriculture	1,487
Manufacturing	2,174
Transportation & Utilities	917
Wholesale & Retail Trade	1,747
Services	850
Public Administration	<u>500</u>
Sub-Total of Civilian Basic Employment	7,675
Armed Forces Personnel	<u>4,187</u>
Total Basic Employment	11,862

Taking the combined total of the employed civilian labor force and armed forces personnel - 28,371 - and subtracting those employed by basic industry gives us a total of 16,509 employed in the secondary or service industries. Thus every person engaged in producing goods and services for export out of the County (this would include Malmstrom AFB) generates 1.4 additional jobs in local employment.

#### Personal Income

Personal income is believed to be the most accurate measure of economic activity for a state or region. It is composed of the following factors: wage and salary disbursements; other labor income, proprietors' income including farm and non-farm; property income; and transfer payments such as old age survivor's insurance benefits, state unemployment benefits and veteran's benefits. Subtracted from this total are personal contributions for social insurance.

Since personal income statistics are only available for States (as the smallest geographical unit) an attempt was made to derive personal income in Cascade County from estimates for the State of Montana. The method employed consisted of taking the percentage of employment in each major category and multiplying it by the amount of personal income listed for that particular category under wages and salary disbursements. Farm proprietors' income was based upon the total amount of Cascade County



farm receipts as a percentage of the State's. Other proprietor's income, property income, and transfer payments were based upon the percentage of population that Cascade County has of the State total.

While this method is somewhat crude, it is felt that it at least puts some magnitude of dollars on the overall Cascade County economy. Additionally, it also helps to pinpoint some of the more important facets of the economy such as the military, trade, and manufacturing. In view of its limitations, however, no attempt at analysis will be made.

Table 4

PERSONAL INCOME IN CASCADE COUNTY, 1960-1963

Wages & Salary Disbursements	<u>Amount in Millions of Dollars</u>			
	1960	1961	1962	1963
Farms	1.2	1.1	1.1	1.1
Mining	0.5	0.7	0.7	0.8
Contract Construction	8.3	8.8	11.7	11.1
Manufacturing	14.6	14.7	16.1	17.0
Wholesale & Retail Trade	19.8	20.3	20.7	21.5
Finance, Insurance & Real Estate	4.5	4.7	4.7	4.8
Transportation, Comm. & Utilities	15.0	14.7	15.0	15.1
Services	4.6	4.9	5.4	5.7
Government	41.2	45.2	48.6	55.5
Federal, State & Local (Civilian)	20.7	22.1	22.9	25.1
Federal (Military)	20.5	23.1	25.7	30.4
Other Labor Income	3.5	3.7	4.0	4.1
Proprietor's Income	19.0	17.0	22.6	20.5
Farm	5.0	2.9	8.0	6.0
Non-Farm	14.0	14.1	14.6	14.5
Property Income	19.7	20.5	20.1	21.4
Transfer Payments	12.2	13.3	13.3	13.7
	164.1	169.6	184.0	192.3
Less: Personal Contributions for Social Insurance	3.4	3.6	3.7	4.1
Total	160.7	166.0	180.3	188.2

Source: U. S. Department of Commerce, Office of Business Economics, Survey of Current Business, August, 1962 & 1964.



## III

MAJOR COMPONENTS OF THE ECONOMYRetail Trade

As mentioned previously, Cascade County, and Great Falls in particular, is the major trading center for several counties in north-central Montana. Generally, Great Falls has exhibited healthy growth in retail sales between the two Census of Business years of 1958 and 1963. Overall sales in Great Falls between 1958 and 1963 increased by 21 percent as compared to an 18 percent increase for the County. Other areas where Great Falls' retail trade performance indicated good growth were in the food group which had a 31 percent increase, automotive sales with a 53 percent increase, gasoline service stations which were up 6 percent, eating and drinking places which were up 14 percent, and non-store retailers which recorded the highest gain - 61 percent.

Other retail categories that showed gains in the County (data in certain categories for the City was withheld by the Census and only reported in the County - an increase or decrease in sales for the County was equated with an increase or decrease in sales for the City since Great Falls is the major trading center in Cascade County) were general merchandise which was up 22 percent, apparel and accessories which had a 15 percent increase, furniture and home furnishings which had a 5 percent increase, and drug and proprietary stores which were up 34 percent.

Retail categories that experienced decreased sales included the lumber, building material, hardware and farm equipment group which decreased 18 and 15 percent in the County and Great Falls respectively. Other retail stores, which includes liquor stores, sporting goods, jewelry, books and stationery, and farm and garden supply stores had a 19 percent decrease in the County and only a 1 percent increase in the City.

When compared to the growth experienced by the State as a whole, both Great Falls and Cascade County compare very well. Thus the City, with an overall sales increase of 21 percent, ranked well above the overall 12 percent increase of the State, as did the 18 percent increase in the County. Other retail categories where Cascade County and Great Falls ranked above the State included general merchandise stores, food stores, automotive dealers, apparel and accessory stores, eating and drinking places, and drug and proprietary stores. On the other hand, the State outranked the City and County in the non-store retailers category, gasoline service stations, and furniture, home furnishings and equipment stores. It also recorded a much lower decrease in lumber, building materials, hardware and farm equipment dealers, and in the other retail store category.

Table 1

## RETAIL TRADE AREA STATISTICS

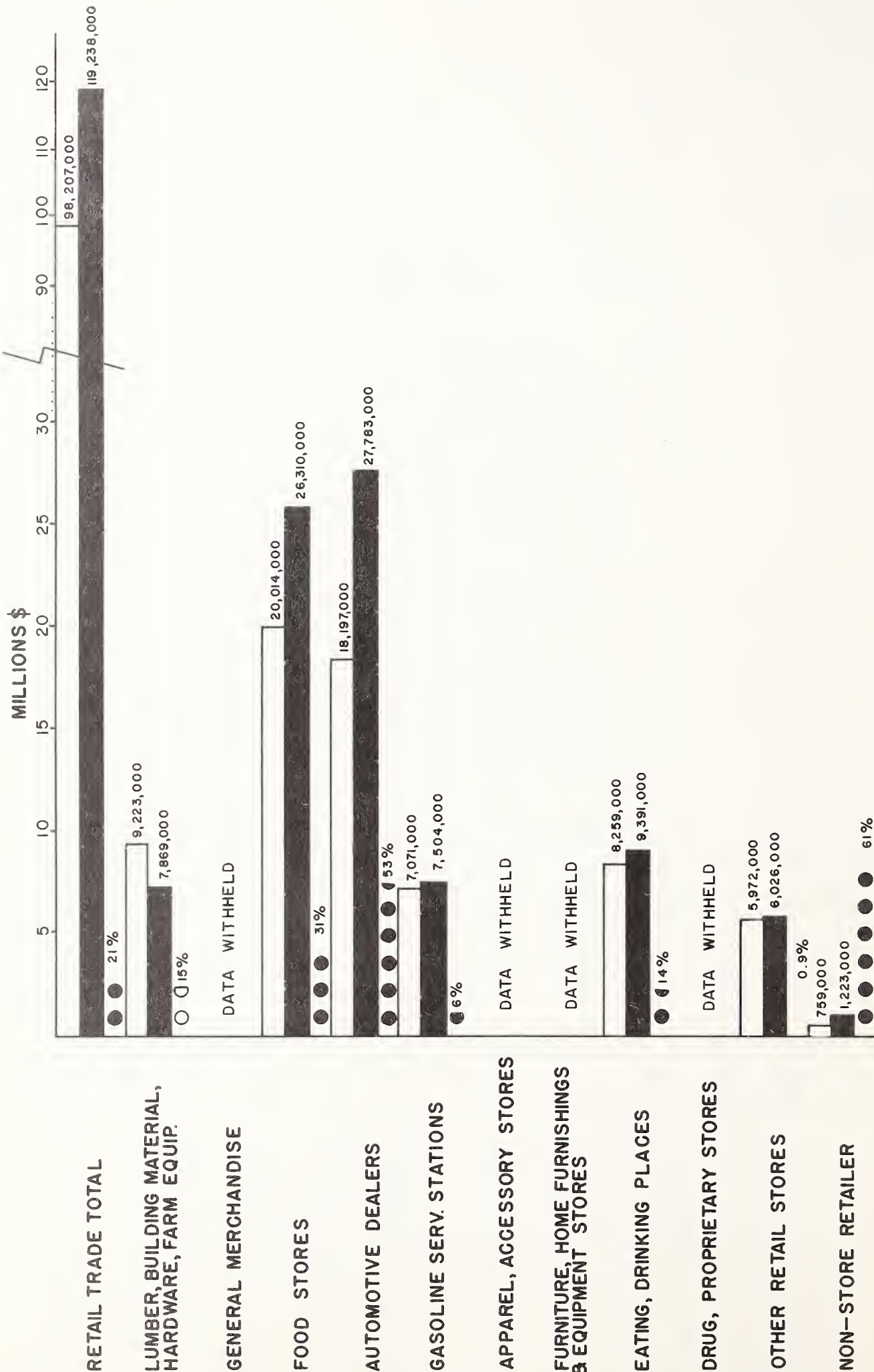
Industry	Cascade County					Great Falls				
	1 9 5 8	1 9 6 3	% Inc.		Estab.	1 9 5 8	1 9 6 3	% Inc.		Estab.
	Estab.	Sales	Estab.	Sales		Estab.	Sales	Estab.	Sales	
Retail Trade	717	\$107,308	651	\$126,899	18%	591	\$98,207	531	\$19,238	21%
Lumber, Bldg. Mat., Hdwre & Farm Equip.	46	10,300	30	8,396	-18%	37	9,223	24	7,869	-15%
General Merchandise	21	13,551	23	16,523	22%	20	(D)*	19	15,926	--
Food Stores	116	21,447	94	27,625	29%	98	20,014	79	26,310	31%
Automotive Dealers	40	19,495	40	28,159	44%	32	18,197	35	27,783	53%
Gas. Serv. Stations	80	7,635	98	8,356	9%	66	7,071	82	7,504	6%
Apparel & Access.	41	5,642	39	6,489	15%	40	(D)	37	(D)	--
Furn., Home Furnish- ings & Equipment	42	6,473	33	6,823	5%	41	(D)	32	(D)	--
Eating, Drinking Places	192	10,350	162	11,806	14%	138	8,259	115	9,391	14%
Drug & Proprietary	18	3,360	18	4,518	34%	17	(D)	15	(D)	--
Other Retail	94	8,323	77	6,737	-19%	79	5,972	60	6,026	1%
Non-Store Retailers	27	804	37	1,467	82%	23	759	33	1,223	61%

\* (D) figures withheld by Census.

Source: U. S. Department of Commerce, Census of Business, Retail Trade, Montana, 1958 and 1963.

# RETAIL SALES & PERCENTAGE CHANGE

1958-1963: GREAT FALLS

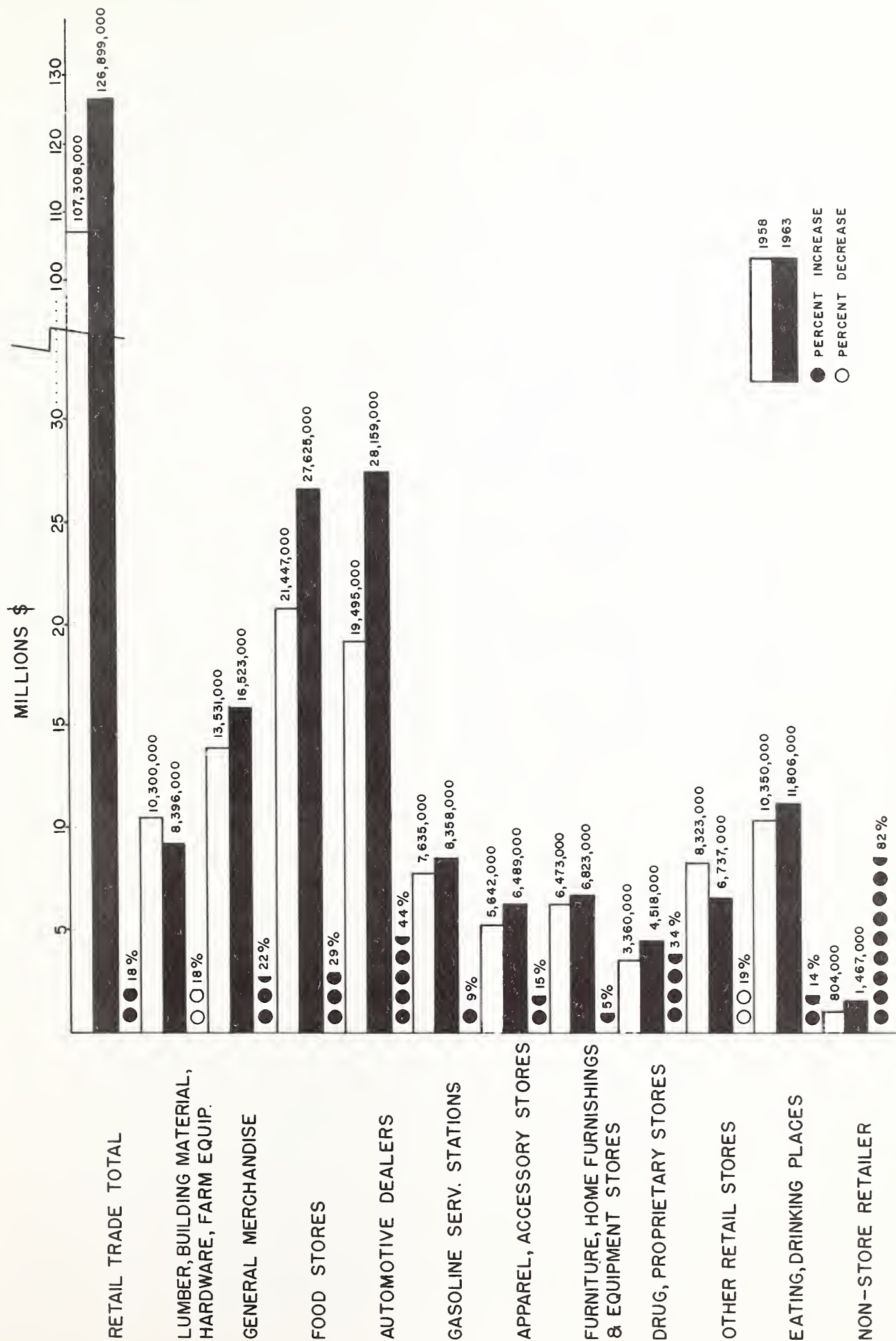


● PERCENT INCREASE  
○ PERCENT DECREASE  
1958  
1963

SOURCE: U.S. DEPT. OF COMMERCE, CENSUS OF BUSINESS, RETAIL TRADE, MONTANA, 1958 & 1963



# RETAIL SALES & PERCENTAGE CHANGE 1958-1963 CASCADE COUNTY



SOURCE: U.S. DEPT. OF COMMERCE, CENSUS OF BUSINESS, RETAIL TRADE, MONTANA, 1958 & 1963

### Per Capita Retail Sales

Although Great Falls increased its overall sales by 21 percent, per capita sales increased by only 5 percent. Cascade County's overall sales increase of 18 percent was matched by only a 1 percent increase in per capita sales.

There were several retail trade categories where per capita sales decreased although an increase was reported in overall sales. This included gasoline service stations which were down 7 percent in the County and 8 percent in the City; apparel and accessory stores which were down 2.4 percent in the County; furniture and home furnishing stores which were down 10.5 percent in the County; eating and drinking places which were down 3.3 percent in the County and 1 percent in the City; and the other retail category which declined 31 percent in the County and 13 percent in the City.

This means that retail sales have not grown as fast as population in either the County or Great Falls. At first it was thought that the reason for this was because the City was losing out on sales to other counties in the trade area. However, a check between 1958 and 1963 in the counties comprising the retail trading area of Great Falls (see later section for this explanation) showed that Great Falls actually increased the percentage of its sales within the trade area from 40.1 percent in 1958 to 46.8 percent in 1963.

Table 2

PER CAPITA RETAIL SALES & PERCENTAGE CHANGE:  
CASCADE COUNTY & GREAT FALLS, 1958-1963

	<u>Cascade County</u>		<u>Great Falls</u>		<u>Percentage Change</u>	
	<u>Sales Per Capita</u>		<u>Sales Per Capita</u>		<u>Cascade</u>	<u>Great</u>
	<u>1958</u>	<u>1963</u>	<u>1958</u>	<u>1963</u>	<u>County</u>	<u>Falls</u>
Total Retail Trade	\$1,578	\$1,586	\$1,888	\$1,987	0.5	5.2
Lumber, Bldg. Mat., H'dwre & Farm Eq.	151	105	177	131	-30.5	-26.0
General Merchandise	199	207	(D)*	265	4.0	--
Food Stores	315	345	384	438	9.5	14.1
Automotive Dealers	287	352	350	463	22.6	32.3
Gas. Serv. Stations	112	104	136	125	-7.1	-8.1
Apparel & Access.	83	81	(D)	(D)	-2.4	--
Furn., Home Furnish- ings & Equipment	95	85	(D)	(D)	-10.5	--
Eating & Drinking Places	152	147	158	157	-3.3	-.6
Drug & Proprietary	49	56	(D)	(D)	14.3	--
Other Retail	122	84	115	100	-31.2	-13.0
Non-Store Retailers	12	18	15	20	50.0	33.3

\* (D) figures withheld by Census

Source: U. S. Department of Commerce, Census of Business, Retail Trade, Montana, 1958 and 1963.

Analysis of interview and questionnaire data conducted for delineation of trade areas revealed that Great Falls primary and secondary trade areas for retailing extend over a ten-county area (excluding Cascade County) including Pondera, Lewis and Clark, Glacier, Choteau, Teton, Hill, Liberty, Toole, Meagher, and Judith Basin. This is considerably larger than the eight-county trade area delineated by the Upper Midwest Economic Study in their publication, Trade Centers and Trade Areas of the Upper Midwest, September, 1963. The trade area population accounted for in the upper midwest study is somewhat smaller than that accounted for by the recent trade area study - 120,000 compared to 170,000. All of this population does not, of course, come to Great Falls to do their shopping. Outside purchases in Great Falls are usually limited to comparison shopping in such items as apparel, furniture, home equipment, appliances and farm equipment. This is not done on a regular basis as much as it is on



an intermittent basis where it can be coupled with a business or social trip.

Great Falls is the dominant shopping center for a large trade area. It contains large department stores and a variety of specialty shops, thereby offering a much larger selection of goods than is possible in a smaller community. The future of the Central Business District is going to depend upon its ability to maintain modern merchandising practices, attractive physical surroundings, good access and adequate parking. The compactness and physical attractiveness of the Central Business District is an essential factor in Great Falls' role as a trading center since one can buy almost anything within a radius of several blocks.

Although no retail sales figures were published by the Census for the Central Business District, it is quite probable that from a relative position the Central Business District has been losing ground. This is probably true for two reasons: first, the growth of shopping centers such as Holiday Village and Northside have siphoned off sales from the Central Business District, and second, the "skid row" strip along Central Avenue and the vacant deteriorating stores have made shopping there less attractive.

The Census showed a decrease in the number of sales establishments in Great Falls between 1958 and 1963. In 1958 the City contained 591 establishments and in 1963 there were 561. Only three major categories showed an increase - automotive dealers which went from 32 to 35 establishments from 1958 to 1963, gasoline service stations which increased from 66 to 82, and non-store retailers which increased from 23 to 33. Evidently, as retail competition gets stronger it will force the more marginal establishments out of business.

Perhaps the most interesting aspect of the gain in sales and establishments was in the non-store retailer category which is essentially characterized by mail-order business. It appears that this category is making up for the decline in establishments with Great Falls increasing its sales in the mail-order and catalog business. It is felt that since this business is usually an "out of town" type of sale, Great Falls has been increasing its out-lying trade area penetration.

It is rather interesting to note what effects the 1964 flood had on retail sales in the County. Sales figures from Sales Management Magazine, which produces retail sales estimates for each county and metropolitan area in the United States, showed an overall drop in total sales of \$10,493,000 or 7.4 percent between 1963 and 1964. Sales categories showing declines were eating and drinking places, down 10.1 percent; general merchandise stores, down 4.9 percent; apparel, down 1.2 percent; furniture and household appliances, down 3.9 percent; gasoline service stations, down 15.8 percent; and, lumber, building material and hardware dealers, down 35.7 percent. The only categories showing increased sales were food, automotive, and drugs.

Table 3

RETAIL SALES IN CASCADE COUNTY, 1960-1964

<u>Type</u>	<u>Amount of Sales (000's)</u>				
	1960	1961	1962	1963	1964
Total Sales	\$116,770	\$120,395	\$133,237	\$141,072	\$130,579
Food	23,030	24,704	26,392	27,418	28,133
Eating & Drinking	11,188	11,834	N.A.	13,554	12,188
General Merchandise	15,639	16,851	18,920	20,230	19,243
Apparel	6,011	6,247	6,727	6,850	6,769
Furn. & Household Appl.	6,601	6,730	7,164	7,730	7,427
Automotive	22,850	21,916	26,147	23,804	28,757
Gasoline Service Stations	8,456	8,953	9,574	10,043	8,458
Drugs	3,728	3,962	4,234	4,351	4,600
Lumber, Bldg. Material & Hardware	11,157	11,046	12,184	12,751	8,203

Source: Copyright 1961, 1962, 1963, 1964, 1965, Sales Management Survey of Buying Power; further reproduction is forbidden.

### Selected Services

Selected service sales in both Great Falls and Cascade County have exhibited a much stronger growth trend than retail sales. The overall percentage growth in sales for the County was 32 percent while Great Falls showed a 26 percent increase. Percentage increases in per capita sales were also stronger for selected service sales, increasing 11.7 and 8.5 percent for the County and the City respectively. The number of establishments grew for the County as a whole, having increased from 352 in 1958 to 412 in 1963, as did the City which increased from 304 to 362 establishments.

All categories of selected service sales showed increases with the exception of motion pictures which decreased 48 percent. The only other category to show a decrease in per capita sales, absolute and percentage-wise, was hotel, motel and tourist courts. Even though the category showed an overall 11 percent increase, per capita sales declined from \$54 to \$52 - a 3.7 percent decrease.

In comparison with the State, either Great Falls or Cascade County outranked the State in all categories except hotels, motels and tourist courts, and motion pictures. The last category actually showed a 21 percent decrease for the State while the County was down 48 percent. One other area where Great Falls did not exhibit as strong a growth rate as the State was in auto repair, auto services and garages. The State's increase totaled 31 percent with Great Falls having registered a 22 percent increase. The County, however, grew 53 percent in this category.



Table 4

SELECTED SERVICES

Industry	Cascade County					Great Falls				
	1958		1963			1958		1963		
	Estab.	Sales	Estab.	Sales	% Inc. or Dec.	Estab.	Sales	Estab.	Sales	% Inc. or Dec.
Selected Service Total	352	\$11,074	412	\$14,570	31.6	304	\$10,328	362	\$12,991	25.8
Hotel, Motel, Tourist Courts, Camps	77	2,904	73	(D)*	--	62	2,793	65	3,097	11.0
Personal Service	141	2,764	161	3,450	24.8	130	2,594	146	3,229	24.5
Misc. Business Serv.	30	1,463	63	2,719	85.8	29	(D)	58	2,658	--
Auto Repair, Auto Serv. & Garages	41	1,589	41	2,432	53.0	35	1,462	30	1,778	21.6
Misc. Repair Serv.	33	446	49	794	78.0	25	418	45	667	59.6
Motion Pictures	11	1,135	6	587	-48.3	10	(D)	4	581	--
Amusement, Recrea. Serv., Except Motion Pictures	19	773	19	(D)	--	13	501	14	981	95.8

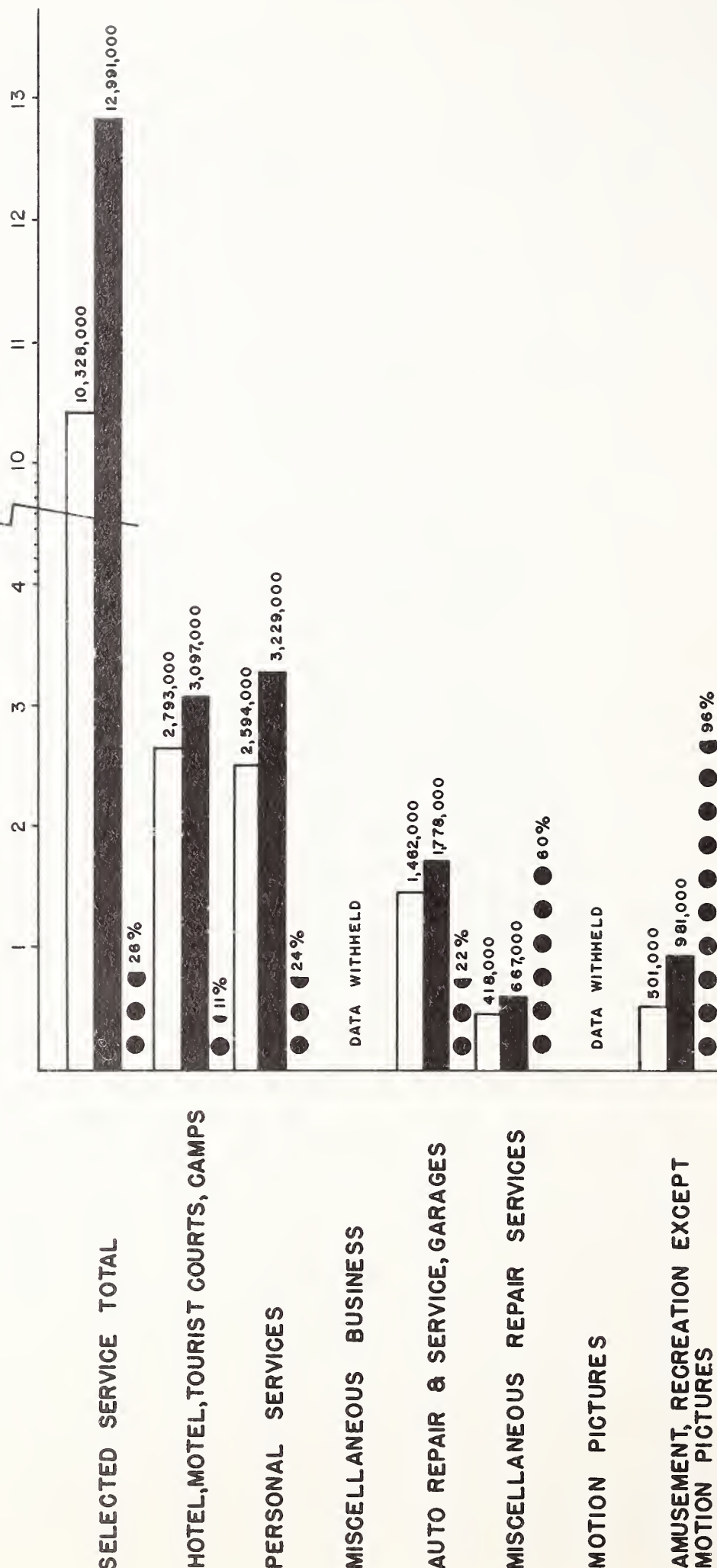
\* (D) Figures withheld by Census.

Source: U. S. Department of Commerce, Census of Business, Selected Services, Montana, 1958 and 1963.

Sales figures in 000's.

# SELECTED SERVICES: SALES & PERCENTAGE CHANGE

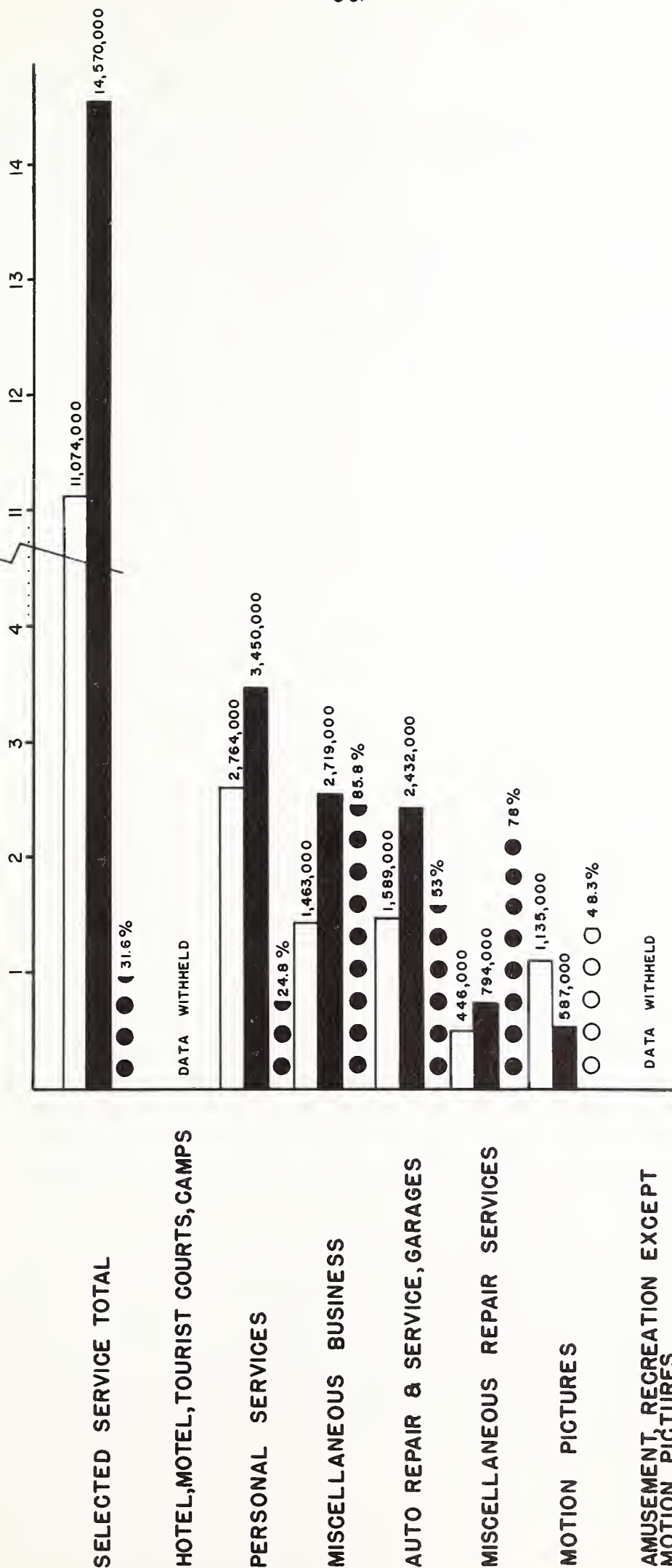
1958 - 1963: GREAT FALLS



SOURCE: U.S. DEPT. OF COMMERCE, CENSUS OF BUSINESS, SELECTED SERVICES, MONTANA, 1958 & 1959

● PERCENT INCREASE  
○ PERCENT DECREASE  
1958  
1963

# SELECTED SERVICES: SALES & PERCENTAGE CHANGE 1958—1963: CASCADE COUNTY



SOURCE: U.S. DEPT. OF COMMERCE, CENSUS OF BUSINESS, SELECTED SERVICES, MONTANA, 1958 & 1959

● PERCENT INCREASE  
○ PERCENT DECREASE  
1958  
1963



Table 5

PER CAPITA SELECTED SERVICES & PERCENTAGE CHANGE:  
 CASCADE COUNTY & GREAT FALLS, 1958-1963

	<u>Cascade County</u>		<u>Great Falls</u>		<u>Percentage Change</u>	
	<u>Sales Per Capita</u>	<u>Sales Per Capita</u>	<u>Sales Per Capita</u>	<u>Sales Per Capita</u>	<u>Cascade</u>	<u>Great</u>
	<u>1958</u>	<u>1963</u>	<u>1958</u>	<u>1963</u>	<u>County</u>	<u>Falls</u>
Total Selected Serv.	\$163	\$182	\$199	\$216	11.7	8.5
Hotel, Motel, Tourist						
Courts & Camps	43	(D) *	54	52	--	-3.7
Personal Service	41	43	50	54	4.9	8.0
Misc. Business Serv.	22	34	(D)	44	54.5	--
Auto Repair, Auto						
Serv. & Garages	23	30	28	30	30.4	7.1
Misc. Repair Services	7	9	8	11	28.6	37.5
Motion Pictures	17	7	(D)	10	-58.8	--
Amusement, Recreation						
Serv., Except Motion						
Pictures	11	(D)	10	16	--	60.0

\* (D) figures withheld by Census.

Source: U. S. Department of Commerce, Census of Business, Selected Services, Montana, 1958 and 1963.

### Wholesale Trade

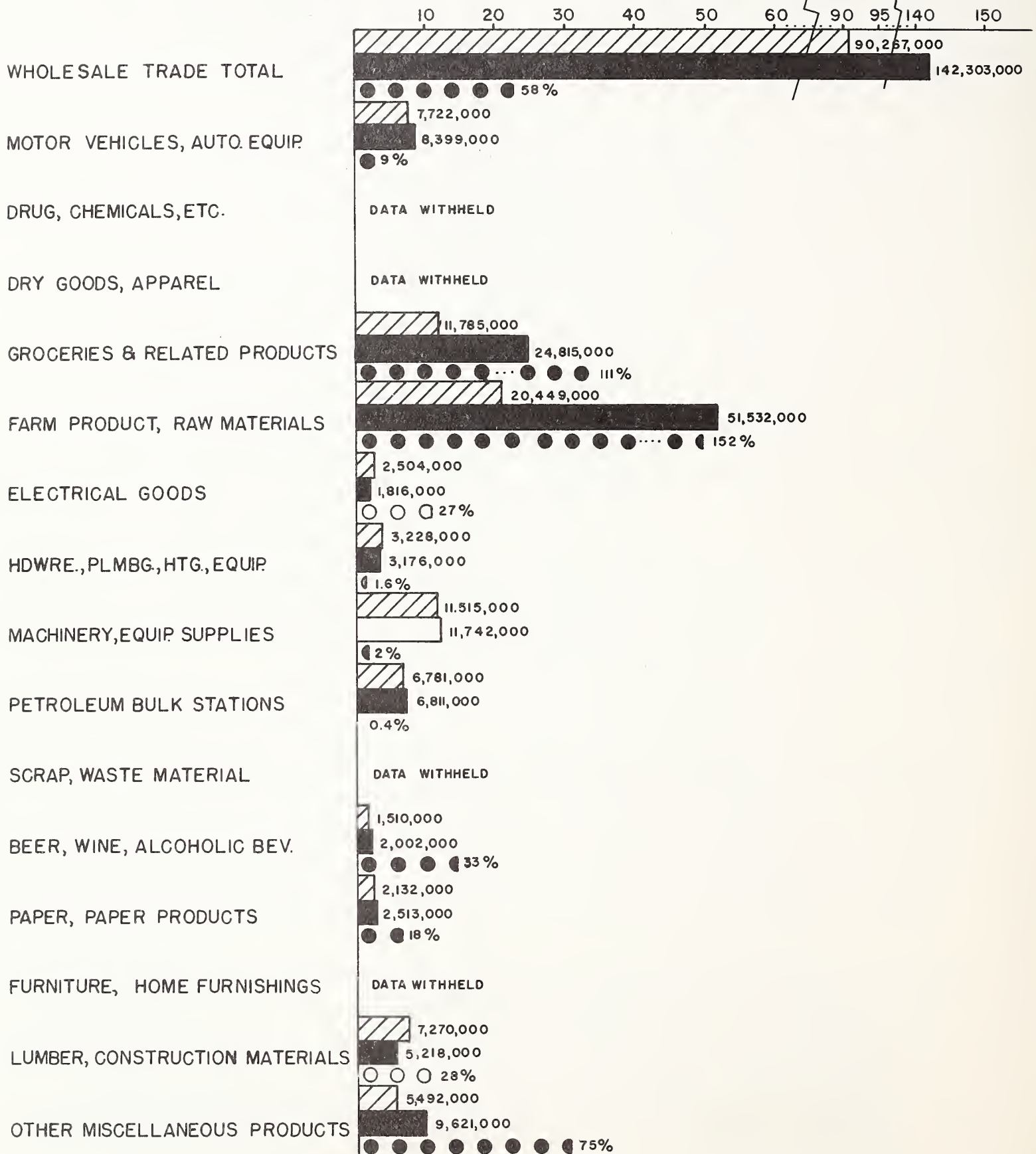
Great Falls experienced a phenomenal growth in wholesaling between 1958 and 1963. The City recorded an increase of 71 percent during this period compared to 58 percent for the County and only 10.7 percent for the State. It is rather difficult to pinpoint the wholesaling categories in the City that helped to achieve this great growth since the Census supplied data for Cascade County only.

The most active categories in terms of percentage increases included groceries and related products with a 111 percent increase, farm products with a 152 percent increase, alcoholic beverages with a 33 percent increase and miscellaneous products with a 75 percent increase. Those categories registering decreases include electrical goods with a 27 percent decrease, and lumber and construction materials with a 28 percent decrease.

Great Falls' sales in wholesaling also advanced from the standpoint of its relative position in the State. In 1958 wholesale trade accounted for 10.2 percent of the State's total while in 1963 it increased to 15.7 percent. On the other hand, Billings, Great Falls' chief competitor, experienced a decline from 24.5 percent of total wholesale sales in Montana in 1958 to 19.6 percent in 1963.

Trade area information indicated that Great Falls services a combined primary and secondary trade area of 22 counties (including Cascade County) that did a volume of \$506,551,000 in 1963 and \$431,554,000 in 1958 - a 17.4 percent increase. These 22 counties had a population of 284,395 in 1960. If Cascade County's sales are deducted for both census years the increase amounts to only 6.7 percent. There can be no doubt that Great Falls' wholesalers increased their trade area penetration as evidenced by the fact that the City increased its share of sales from 18.0 percent of the trade area in 1958 to 26.2 percent in 1963. The increase for the County was approximately of the same magnitude going from 20.9 percent of total trade area sales in 1958 to 28.1 percent in 1963.

# WHOLESALE TRADE & PERCENTAGE CHANGE 1958-1963: CASCADE COUNTY



SOURCE: U.S. DEPT. OF COMMERCE, CENSUS OF BUSINESS, WHOLESALE TRADE, MONTANA, 1958-1963

● PERCENT INCREASE  
○ PERCENT DECREASE

▨ 1958  
■ 1963



Table 6

## GROWTH IN WHOLESALE SALES, CASCADE COUNTY, 1958-1963

Type	1 9 5 8		1 9 6 3			Percent Increase 1958-1963
	Estab.	Sales (000's)	Estab.	Sales (000's)		
Wholesale Trade	169	\$90,267	160	\$142,303		57.6
Motor Vehicles, Auto Equipment	19	7,722	20	8,399		8.8
Drugs, Chemicals, Allied Prod.	4	(D)*	6	3,995		--
Dry Goods, Apparel	2	(D)	2	(D)		--
Groceries & Related Products	21	11,785	19	24,815		110.6
Farm Products - Raw Materials	23	20,449	20	51,532		152.0
Electrical Goods	10	2,504	7	1,816		-27.5
Hardware, Plumbing, Heating						
Equipment Supplies	7	3,228	5	3,176		-1.6
Machinery, Equipment, Supplies	23	11,515	28	11,742		2.0
Metals, Minerals, Ex. Petroleum						
Products and Scrap	--	(D)	2	(D)		--
Petroleum Bulk Sta., Terminals	20	6,781	18	6,811		0.4
Scrap, Waste Material	6	1,795	2	(D)		--
Tobacco, Tobacco Products	1	(D)	2	(D)		--
Beer, Wine, Dist. Alcoholic Prod.	6	1,510	3	2,002		32.6
Paper, Paper Prod., Ex. Wallpaper	5	2,132	5	2,513		17.9
Furniture, Home Furnishings	5	2,217	2	(D)		--
Lumber, Construction Materials	7	7,270	9	5,218		-28.2
Other Misc. Products	10	5,492	10	9,621		75.2

\* (D) figures withheld by Census.

Source: U. S. Department of Commerce, Bureau of the Census, Census of Business, Wholesale Trade, Montana, 1958 and 1963.

## Manufacturing

Although the Metropolitan Area is not a large and important manufacturing center in relation to other metropolitan areas in the country, its manufacturing activity plays an important role in the economy. In terms of rank importance, the primary metals industry, headed by The Anaconda Company, is the number one manufacturer in terms of both employees and payroll. Second in importance in manufacturing is the food and kindred products group, followed by the printing and publishing group. Together these three groups comprised 84.5 percent of total manufacturing employment in 1960. Of the 3,260 manufacturing employees, primary and fabricated metals accounted for 1,370 or 42 percent, food and kindred products accounted for 809 or 24.8 percent, and printing and publishing accounted for 576 or 17.7 percent.

The trend in manufacturing employment in the County since 1940 has been upward in absolute numbers but has declined in relative terms. In 1940 there were 2,457 employees in manufacturing, or 16.3 percent out of a total employed labor force of 15,051. In 1950 employment in manufacturing had risen to 2,935 but dropped to 14.9 percent of the employed labor force. Manufacturing employment in 1960 increased to 3,260 with a further drop to 13.5 percent of the employed labor force.

The main reason for the relative decline in manufacturing employment can be attributed to a decline in employment in primary metals along with increased efficiency in production techniques. Primary metals was the only group to show a declining employment trend since 1940. From 1,548 employees in 1940, employment rose to 1,837 in 1950 and then dropped to 1,370 in 1960. Primary metals' relative position in the labor force dropped from 10.3 percent of total employment in 1940, to 9.3 percent in 1950 and then to 5.7 percent in 1960.

Food and kindred products employment and printing and publishing employment have both doubled since 1940 although their relative employment positions have only increased slightly. From 407 employees, or 2.7 percent of total employment in 1940, food and kindred products employment rose to 520 in 1950 and to 809 in 1960, or 3.3 percent of total employment. Printing and publishing accounted for 238 employees in 1940 or 1.6 percent of total employment. Employment rose slightly in 1950 to 297 with a very slight decline to 1.5 percent of total employment and then increased to 576 or 2.4 percent of total employment in 1960.

The latest Census of Manufactures (1963) listed 61 manufacturing establishments in the County of which only 25 contained 20 or more employees. Most of the manufacturing firms are therefore small operations. The last detailed breakdown from the 1958 Census showed 55 manufacturing establishments of which 34 were in the 1-19 employees class, 11 in the 20-49 class, 4 in the 50-99 class, 4 in the 100-249 class, and one each in the 250-499 and 500 or over classes.

The Census showed a fairly rapid gain in manufacturing activities between 1954 and 1958 with a slackening off between 1958 and 1963. The growth in manufacturing employment between 1954 and 1958 was greatly exceeded by value added and by payroll growth. Growth in employment between 1958 and 1963 was more in line with value added and value added per worker. The Census also revealed that non-production line workers engaged in manufacturing are growing faster than production line employees which means that greater efficiency is being achieved by Cascade County manufacturers. It also helps explain the fairly high increases in manufacturing payroll since non-production workers are more highly paid than are production workers. Thus in 1954 non-production workers averaged \$4,929, in 1958 the average rose to \$5,096 and in 1963 it reached \$6,744. The gap between production and non-production payroll declined from \$1,406 in 1954 to \$507 in 1958 but then increased more than three-fold to \$1,725 in 1963. Manufacturing income should therefore grow rather fast if this trend continues.

Table 7

CASCADE COUNTY MANUFACTURING CHARACTERISTICS: 1954-1963								
Year	Est's	<u>All Employees</u>		<u>Prod. Workers</u>		Value Added (000's)	<u>Avq. Payroll Per</u>	
		No.	Payroll (000's)	No.	Wages (000's)		Employee	Worker
1954	56	2,559	\$ 9,914	1,924	\$ 6,778	\$27,382	\$3,874	\$3,523
1958	55	2,786	13,169	2,029	9,311	39,416	4,727	4,589
1963	61	2,884	15,888	2,065	10,365	42,583	5,509	5,019

PERCENTAGE INCREASE IN EMPLOYEES, PAYROLL & VALUE ADDED

<u>Year</u>	<u>Employees</u>	<u>Payroll</u>	<u>Value Added</u>
1954-1958	8.9	32.8	43.9
1958-1963	3.5	20.6	8.0

Source: U. S. Department of Commerce, Bureau of the Census, Census of Manufactures, Montana, 1954, 1958 and 1963.



## Agriculture

Cascade County's agriculture has followed the State and national trends toward fewer and larger farms. This trend has gone on since the 1930's and resulted partly from the early unsatisfactory homestead pattern. In recent years, greater mechanization and commercialization of agriculture helped to continue this trend as increased units of land were necessary for the economic utilization of costly farm machinery. The actual decline in the number of farms did not commence until the middle and late 1930's when the number of farms dropped from 1,478 in 1934-1935 to 1,401 in 1939-1940. The 1959 Census of Agriculture reported 1,033 farms in Cascade County compared to a peak of 1,478 farms in 1934. This trend relationship is portrayed in the following graph showing the decline in numbers of farms.

As farms have been decreasing in number, farms in the 1,000 acre and over category have been increasing most rapidly. Farms in all other size classes have been declining with the exception of the 50-99 acre category which has shown a slight increase since 1950. It is apparent therefore that large farm consolidations are taking place by the absorption of the smaller farms. This changing relationship in farm size is portrayed by the accompanying graph entitled, Relative Growth in Size of Cascade County Farms.

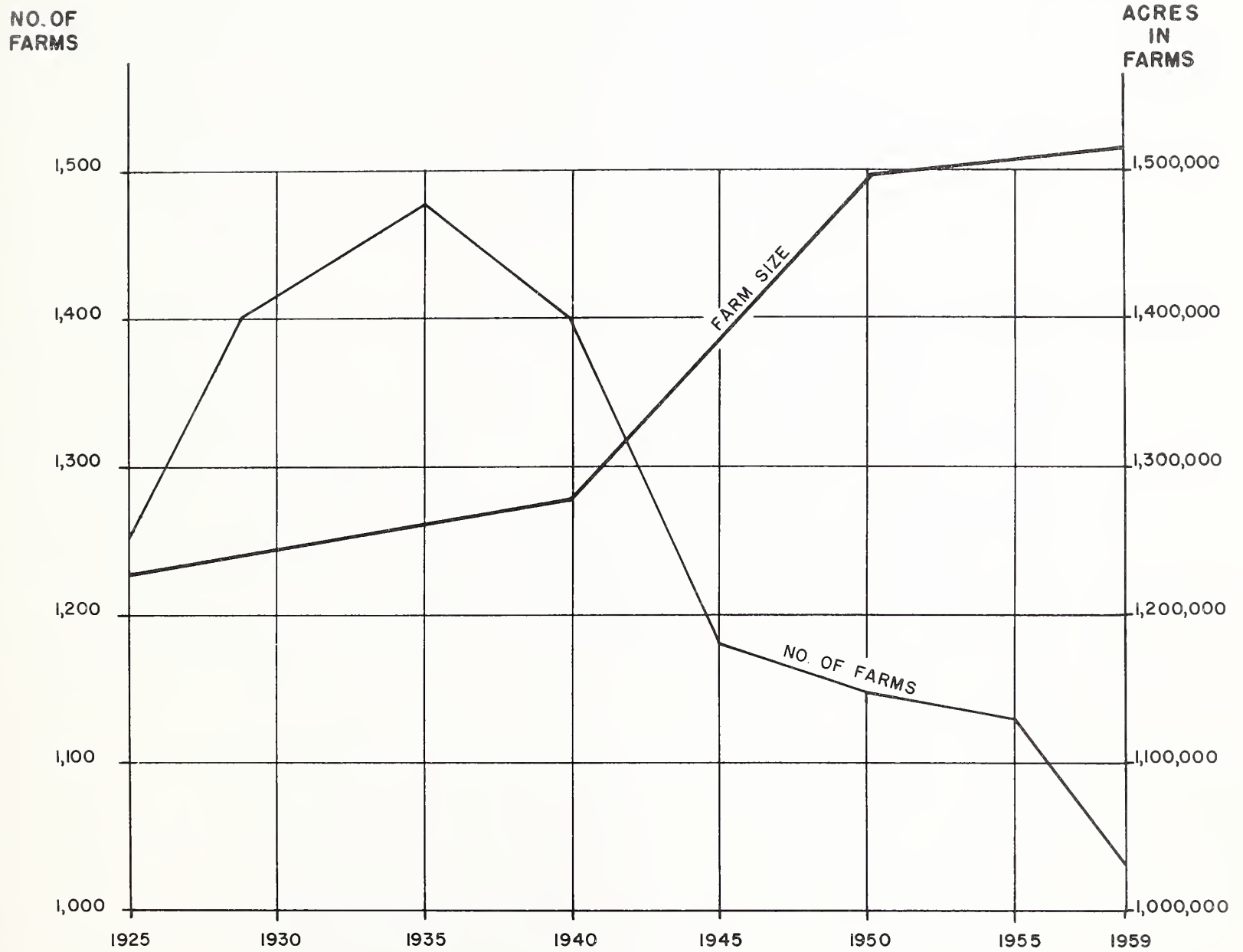
## Agricultural Production

In Cascade County wheat is the leading cash crop followed in importance by hay, barley, oats and potatoes. The County has been a fairly stable wheat producer, particularly in winter wheat, although adverse weather and moisture conditions have often caused declines in yield. Agricultural records were checked back to 1939 and the average yield during this 25-year period was 3,330,000 bushels per year.

In terms of cash receipts, crops, which is led by wheat, have always been the main source of income. From 1952 to 1963 there were only two years (1960 and 1961) where crops lost their lead as the principal cash income producer.

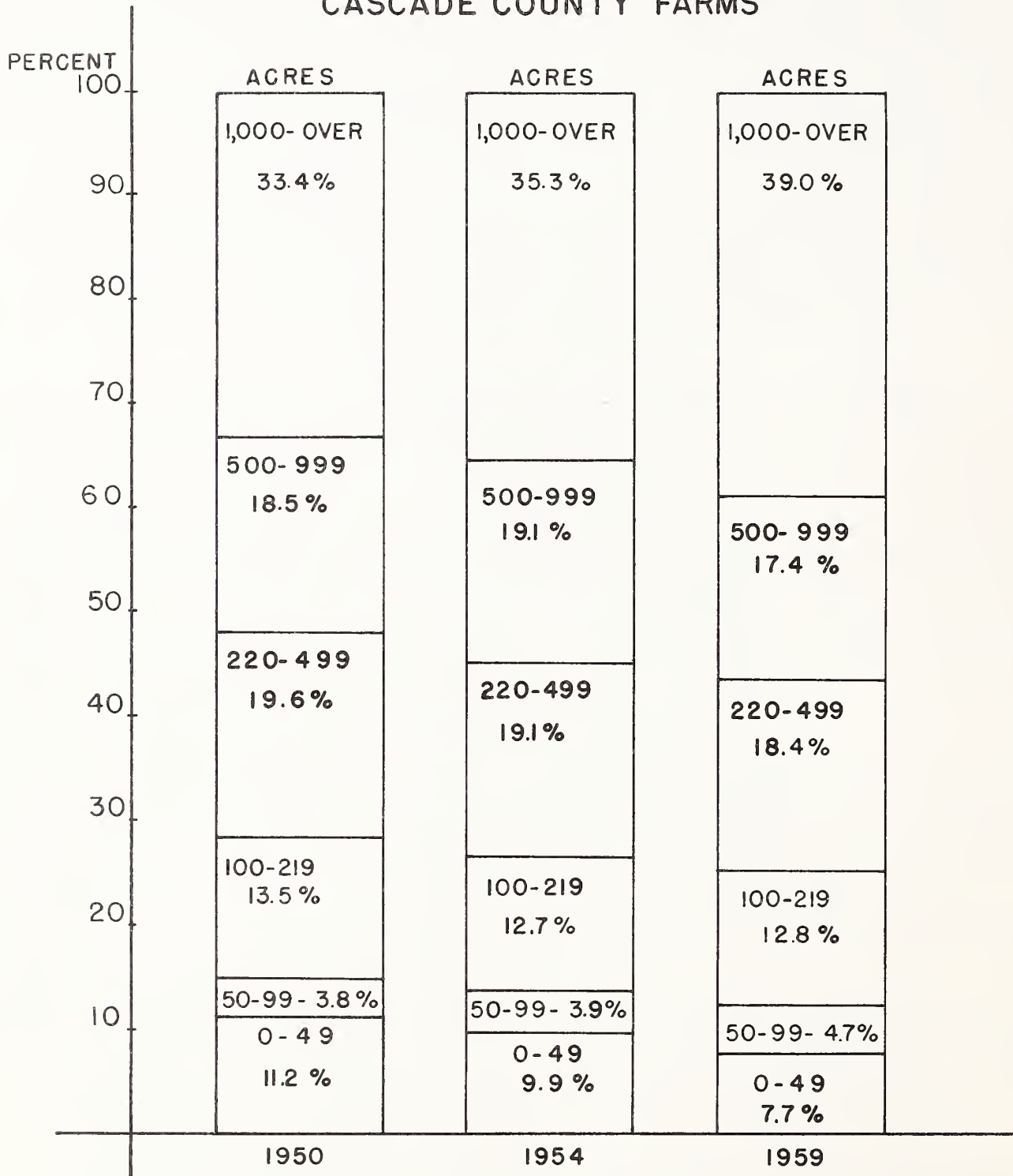
In recent years livestock has assumed greater importance in the agricultural economy. Agricultural marketings in livestock reached \$7.1 million in 1958 and since then have been

## RELATIONSHIP BETWEEN NO. OF FARMS & FARM SIZE IN CASCADE COUNTY



SOURCE: U.S. DEPT. OF COMMERCE, BUREAU OF THE CENSUS, CENSUS OF AGRICULTURE, (VARIOUS YEARS)

# RELATIVE GROWTH IN SIZE OF CASCADE COUNTY FARMS



SOURCE: U.S. DEPT. OF COMMERCE, CENSUS OF AGRICULTURE, MONTANA, 1950, 1954, 1959.

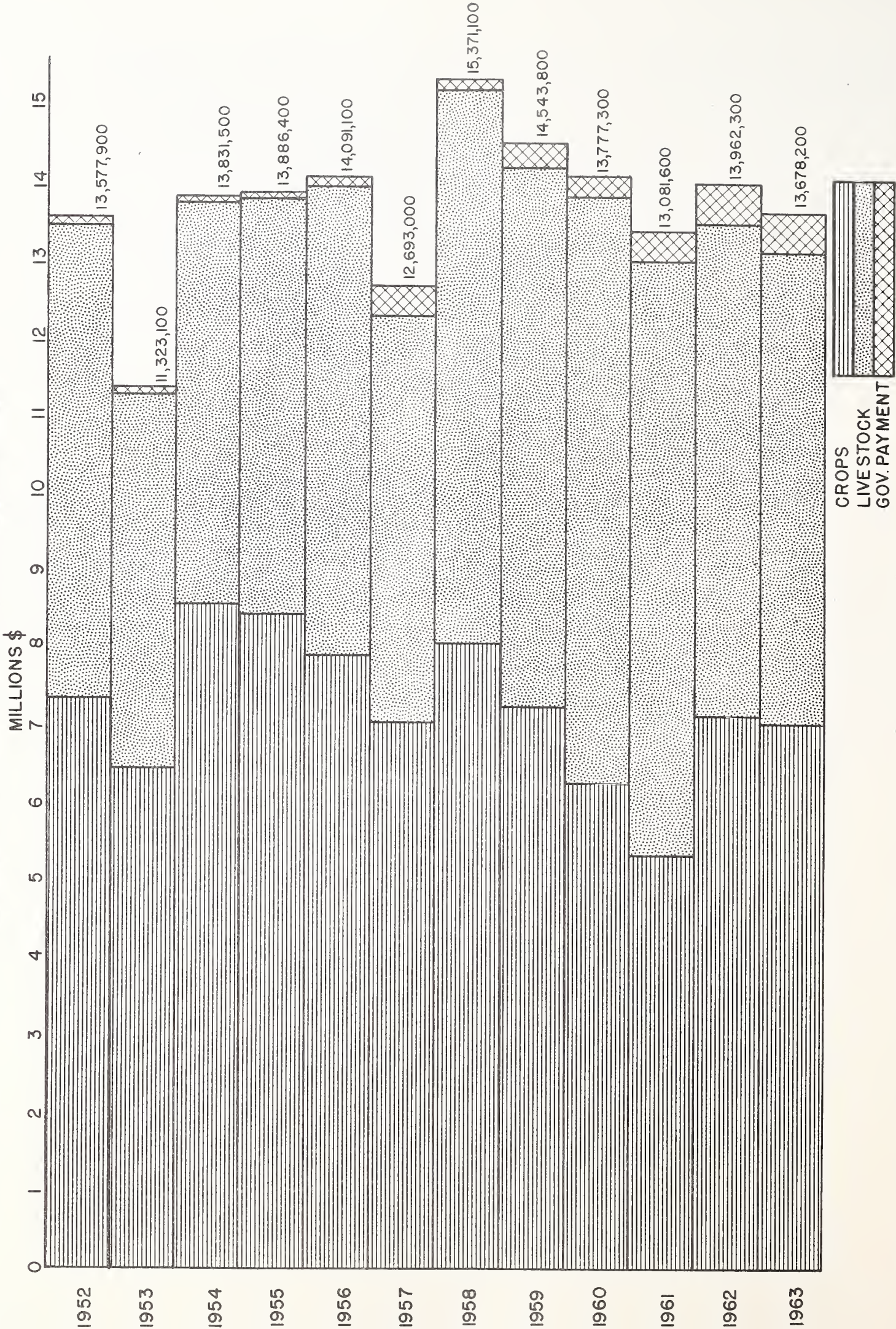


close to or above the \$7 million level. The number of cattle on Cascade County farms has grown steadily over the years although there have been many dips and rises due to cattle prices, weather and range conditions. In 1950, Cascade County had 52,100 cattle on its farms whereas in 1964 the total reached 79,300. The 15-year average during this span of time was 65,320. Cattle prices, feed prices, and grazing conditions have always had an influence upon the number of cattle on farms and ranches. Generally speaking, drought conditions will usually force liquidation of livestock while good grazing conditions will encourage ranchers to restock. In recent years drought conditions, as in 1961, caused a decline in livestock. This was followed by a sharp increase in livestock in 1962 and 1963 when conditions improved (see Graph).

### Irrigation Patterns

Cascade County is basically a dry-land farming area although some irrigated crop production is found in the County. The long-term trend in the County has exhibited a relatively small reliance upon irrigated crop land even in drought years. For the most part, the value of crops produced on irrigated land has not varied too greatly from year to year except in 1953 and 1955 when the value of crop production dropped below \$1 million. Between 1952 and 1963 the 12-year total value of crop production by irrigated land was \$14,091,100 compared to \$99,530,800 for non-irrigated land. This amounts to a 12-year weighted average of irrigated and non-irrigated crop production of 12.4 and 87.6 percent respectively.

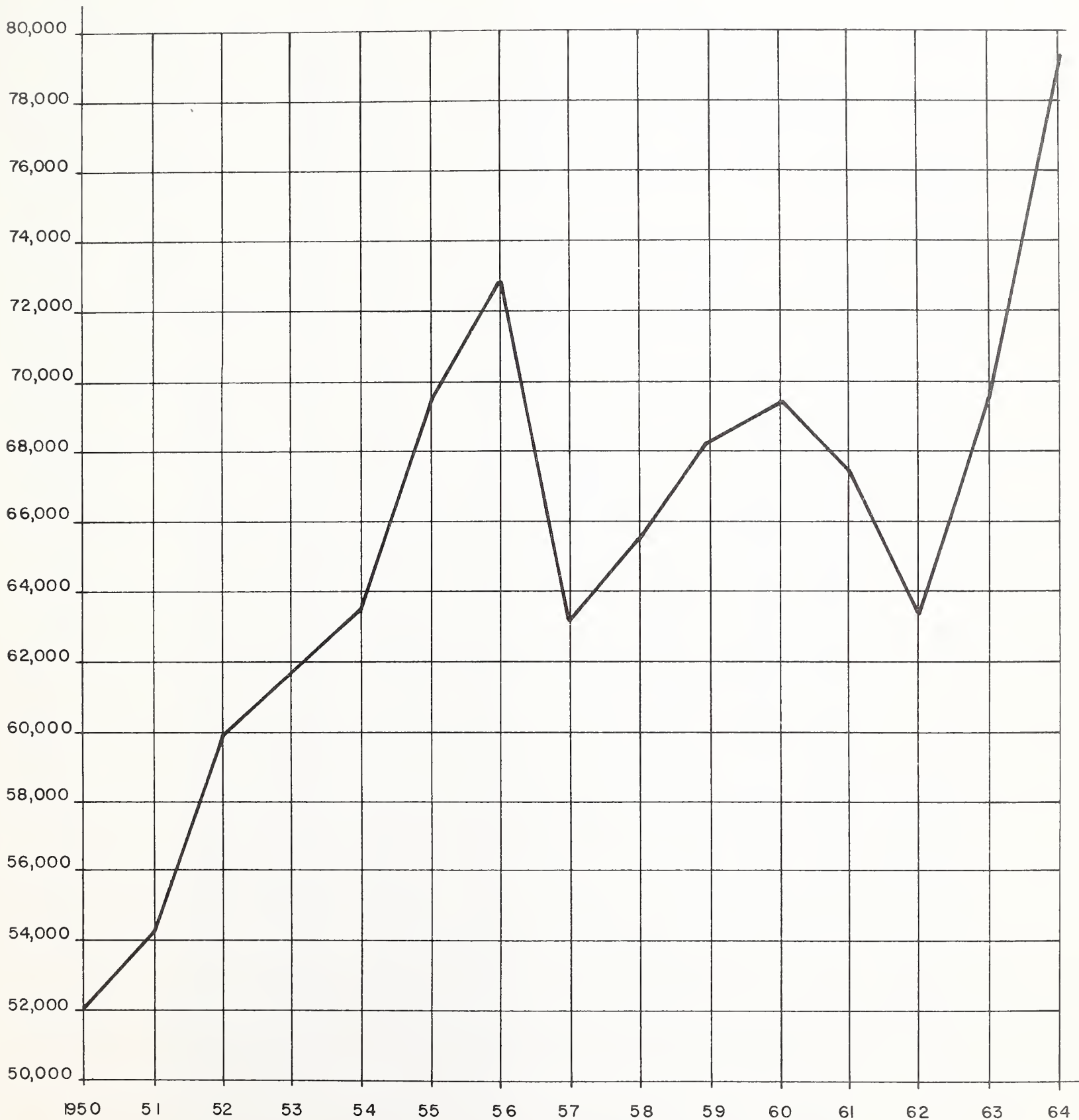
# CASCADE COUNTY AGRICULTURAL INCOME



SOURCE: MONTANA DEPT. OF AGRICULTURE, (IN COOPERATION WITH U. S. DEPT. OF AGRICULTURE, AGRICULTURAL MARKETING SERVICE)  
MONTANA AGRICULTURAL STATISTICS, 1952 - 1963



# ALL CATTLE ON CASCADE COUNTY FARMS 1950-1964



SOURCE: MONTANA DEPT. OF AGRICULTURE, MONTANA AGRICULTURAL STATISTICS, VARIOUS YEARS.



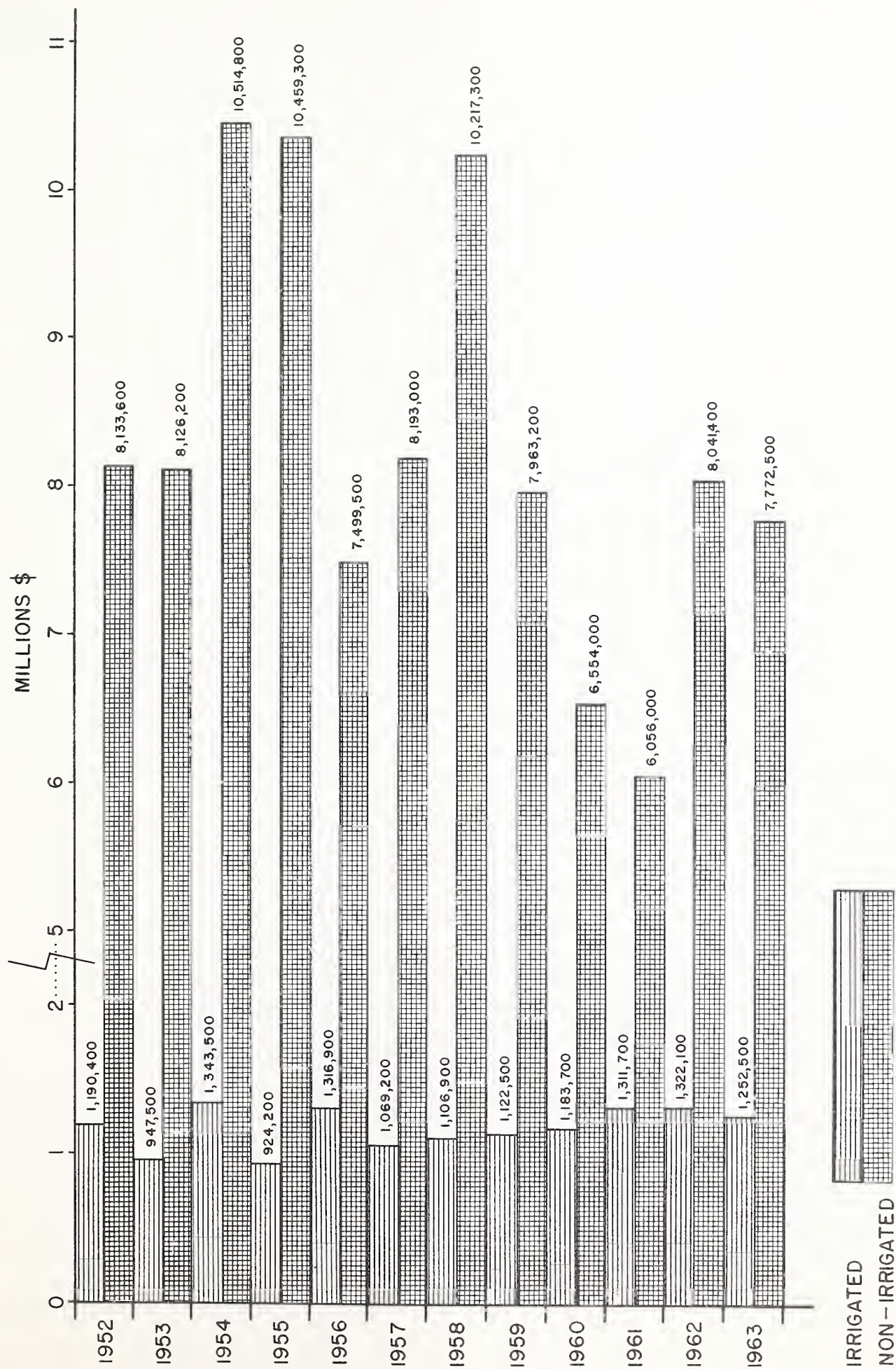
Table 8

## CASCADE COUNTY - ACRES HARVESTED &amp; VALUE OF CROP PRODUCTION BY IRRIGATED &amp; NON-IRRIGATED LAND

Year	Irrigated		Irrig. as % of Total	Non-Irrigated		Non-Irrig. as % of Total
	Acres Harvested	Value of Crop Production		Acres Harvested	Value of Crop Production	
1952	21,540	\$ 1,190,400	12.8	253,950	\$ 8,133,600	87.2
1953	23,760	947,500	10.4	249,910	8,126,200	89.6
1954	29,010	1,343,500	11.3	242,280	10,514,800	88.7
1955	22,755	924,200	8.1	243,330	10,459,300	91.9
1956	23,410	1,316,900	14.9	227,310	7,499,500	85.1
1957	25,780	1,069,200	11.5	252,210	8,193,000	88.5
1958	28,690	1,106,900	9.8	258,710	10,217,300	90.2
1959	24,990	1,122,500	12.3	246,240	7,963,200	87.7
1960	21,387	1,183,700	15.3	236,413	6,554,000	84.7
1961	22,949	1,311,700	17.8	207,312	6,056,000	82.2
1962	27,790	1,322,100	14.1	226,515	8,041,400	85.9
1963	26,591	<u>1,252,500</u>	16.1	223,809	<u>7,772,500</u>	83.9
		\$14,091,100			\$99,530,800	
					<u>\$113,621,900</u>	

Source: Montana Department of Agriculture, (Cooperating with U. S. Department of Agriculture, Agricultural Marketing Service), Montana Agricultural Statistics, various years.

# VALUE OF IRRIGATED & NON-IRRIGATED CROP PRODUCTION CASCADE COUNTY



IRRIGATED  
NON-IRRIGATED

SOURCE: MONTANA DEPT. OF AGRICULTURE, (IN COOPERATION WITH U.S. DEPT. OF AGRICULTURE, AGRICULTURAL MARKETING SERVICE) MONTANA AGRICULTURAL STATISTICS, 1952-1963



Malmstrom Air Force Base

Attempting to gauge the real economic importance of Malmstrom Air Force Base is a rather difficult task. Although excellent cooperation was received from Malmstrom, certain questions could not be answered because of military reasons. In addition, although the sales figures for the Base Exchange were furnished, it was requested that they not be made public. In complying with this request we will therefore refer to data reported by the 1963 Census of Retail Trade for commissaries, exchanges, and eating and drinking places operated for military personnel by the U. S. Department of Defense. This is essentially public information since it is published by the Census and reference to it cannot be considered a breach of confidence.

The Census reported that Cascade County had total sales of \$5.1 million in 1963 resulting from commissaries, exchanges, and eating and drinking places. The 6,150 military personnel assigned to Malmstrom in 1963 accounted for approximately 17,600 persons or 3,270 families and 2,880 single personnel. If the per capita sales figure of \$1,586 is applied to this population estimate it results in \$27.9 million in retail sales that is accounted for by Malmstrom families. This estimate is somewhat high since we know that the retail trade area outside of the County accounts for approximately 26 percent of sales. If we adjust the \$27.9 million by this amount it leaves us with a net figure of \$20.6 million. Deducting the \$5.1 million in sales on the base leaves a net of \$15.5 million in Cascade County's retail sales that are accounted for by Malmstrom personnel. Thus 13 percent of Cascade County's retail sales in 1963 can be attributed to Malmstrom Air Force Base.

It is almost impossible to estimate what Malmstrom's impact is on wholesale sales since exact estimates on what is procured through local wholesalers could not be obtained. The previous analysis on wholesale sales and the tremendous growth encountered between 1958 and 1963 leads one to surmise that perhaps Malmstrom accounted for a good portion of this increase. This supposition however is not supported by the figures supplied by Malmstrom's Economic Impact Study for 1963. Malmstrom estimated that it spent \$2.75 million for local food stuff purchases. The two fastest growing wholesale categories in 1963 were farm products and groceries which together accounted for total sales of \$76.3 million. The Malmstrom food purchases represent only 3.6 percent of the \$76.3 million in farm products and groceries. Since figures are unavailable it is not possible to gauge the overall economic impact of other local Malmstrom purchases on wholesale sales.

In other areas Malmstrom's economic impact is quite formidable although there are some expenditures of a non-recurring nature such as the \$11.5 million spent in 1963 for missile construction and the \$200,000 spent in 1964 for the construction of the Malmstrom Federal Credit Union. Adjusting for these non-recurring expenditures leaves a total expenditure of \$53.3 million in 1963 and \$44.6 million in 1964, which breaks down as follows:

	<u>1963</u>	<u>1964</u>
Military & Civilian Payroll	\$39,200,000	\$30,290,000
Base Procurement	12,074,000	13,197,000
Missile Construction	11,500,000*	---
Malmstrom Fed. Credit Union	---	200,000*
Federal Aid to Education	2,060,000	1,114,000
Contributions	---	<u>26,000</u>
Total	\$53,334,000	\$44,627,000

\*Considered to be non-recurring items and therefore excluded from total.

In discussing long-range trends and what effect the integration of the new missile wing would have on manpower requirements, Malmstrom officials could not give any figures. They did indicate that the Minuteman II system was going to be the basic offensive missile system at least until the 1980's. This, presumably, should have a stabilizing effect upon Malmstrom and its relationship to the Cascade County economy. However, the rapid changes that have taken place in missile and defense technology do not guarantee that this will still be the basic missile system by 1981. Accordingly, for our 1981 projections of employment it was decided to place an indirect emphasis upon military employment rather than a direct emphasis. This means that in projecting the overall employment and population in the County for 1981 only the civilian labor force was utilized. Cascade County had a low ratio in the percentage of civilian labor force to total population because of the Malmstrom personnel - 32.9 percent in 1960. It is expected that this low civilian labor participation rate will hold true in 1981 because of the increased personnel at Malmstrom that are not counted as part of the civilian labor force.



INDUSTRY ANALYSIS AND PROJECTIONS OF EMPLOYMENT TO 1981Introduction

In developing the economic forecast for Cascade County in 1981, major emphasis has been placed on employment projections by industry. The reasons for this reliance upon employment are the clear-cut relationship between employment growth and population growth, the availability of past trends in employment data as reported by the Census, and the availability of employment projections for the United States and the State of Montana with which Cascade County could be compared on a ratio basis. Additionally, the interview and questionnaire data assembled during the study was keyed to business growth and prospects as they related to employment.

In the development of any economic forecast certain basic assumptions must be made in order to focus in on long-term trends and not be influenced by short-term developments. The employment forecast assumes that no major depression will occur between now and 1981 and also that no major war will take place.

As previously stated, in the forecast of employment by industry group, the major emphasis was placed on past trends and the relationship of growth between Cascade County and the State. Projections for Montana in 1976 were made by the National Planning Association in a study entitled Economic Projections by States for the Years 1976 and 2000 and extrapolated to 1981. Projections were then developed for Cascade County based upon its share of State employment in each industry.

One last factor regarding this section of the report should be mentioned - the limitations of the projection. The "target date" of 1981 is currently 16 years away and many changes and events can occur in this time. Users of this report should therefore bear in mind that the projections are based upon the best available data that could be secured at this time. In the case of Great Falls and Cascade County data, collection came from many numerous sources. The fact that the County did not become a Standard Metropolitan Statistical Area until 1960 caused certain hardships since data from government sources was not available for prior years or even for the current period (two examples are the Annual Survey of Manufactures, and Central Area Retail Sales Statistics). Consequently, the chances for some error, although not intentional, are present.

## Agriculture

Agricultural employment in Cascade County decreased 22 percent between 1950 and 1960. Agriculture's proportion of the County's employed labor force dropped from 9.7 percent in 1950 to 6.2 percent in 1960. Compared to the State however, Cascade County agricultural employment showed slight increases. In 1940 Cascade County comprised 3.4 percent of total State agricultural employment, in 1950 3.5 percent, and in 1960 3.8 percent. Thus the statewide decline has been at a faster rate than Cascade County.

It is anticipated that agricultural employment in the County will decline by 1981 but at a much lower rate. Cascade County employment in agriculture in 1981 is expected to range from 1,330 to 1,400. This represents a decline ranging from 10.5 to 5.8 percent.

The reasons for this slowdown in the rate of the decline are based upon the growth of livestock and livestock production and the stable production of crops. In addition there is a growing possibility of a change in the Federal Government's agricultural policies from curtailment of production, particularly in grain crops, to production of surpluses. This has been brought about by the increased awareness of using surplus crops as an instrument of foreign policy in the underdeveloped nations of the world. Although this policy may not be changed in a few short years it certainly looms as a good probability by the late 1970's. Thus a growing international market for agricultural products could have an effect on past trends. The reason that no increase in agricultural employment is contemplated is due to the expected continuation of increases in yields per acre and agricultural productivity per unit of labor.

The limitations on this forecast include the fact that weather is probably the chief controlling factor. Drought conditions or unfavorable weather during the growing season could severely affect agricultural production and employment. A second factor is the effect of governmental agricultural policies which can change at any time. Finally, it is impossible to say how much Cascade County will be producing in future years because commodity projections are unavailable for the State.

In conclusion, it is anticipated that Cascade County's agricultural economy will continue its stable production record of past years. On the plus side of the economy is the possibility of increased agricultural income resulting from a possible



change in Federal policies of limited grain production to an increase in production. We also have the prospect of increased livestock production and feedlot operations in the County utilizing locally produced feed grains. The livestock prospect will depend upon the growth of export markets in other parts of the State as well as the country, particularly in the west. On the minus side, there is always the possibility of adverse weather conditions which will affect production and a continued trend in increased agricultural output per worker which will continue to reduce labor requirements.

### Manufacturing

Manufacturing employment in Cascade County increased from 2,935 to 3,260 between 1950 and 1960, an 11.1 percent increase. From a relative standpoint, manufacturing employment has shown a decline as a percentage of total County employment and total State manufacturing employment. This has been chiefly due to increased efficiency and output per production worker. Some major employers reported projected increases in employment for their firms. It is therefore estimated that manufacturing employment in 1981 will range from 4,300 to 4,400.

Following is an analysis of the major industrial sub-groups along with a capsule summary of the various factors that will influence its future outlook in terms of growth.

#### Primary and Fabricated Metals (SIC's 33 & 34)

In discussing primary metals in the County we are mainly talking about The Anaconda Company. Anaconda currently employs about 1,500 persons or 100 percent of total employment in primary metals (SIC 33). If fabricated metals (SIC 34) are included then Anaconda accounts for approximately 95 percent of total employment. Establishments in the fabricated metals industry are, for the most part, small iron and sheet metal firms.

Although Anaconda is often thought of as mainly a copper producer, in actuality it's local production is about two-thirds zinc and one-third copper. The refining operation, which utilizes electrolysis, recovers other metals such as zinc and lead as well as precious metals such as gold and silver.

Anaconda itself is the main customer for the zinc and copper produced at the Great Falls reduction plant. Approximately 75 percent of production is sent to its other plants while 25 percent goes to its toll customers.



Copper, being a homogeneous product, is subject to less competitive action in the industry because there is no quality differentiation of one producer compared to another. Competition depends, for the most part, on price. Competition is also influenced by imports and exports since the copper market is essentially a world market.

The future prospects of the copper industry depend to a great extent on general business conditions. This is due to the fact that it is used primarily in industries making producers and consumers goods. It is also susceptible to international business and political developments since the ore is found in numerous areas of the world and because it enters freely into international trade.

Although Anaconda has increased its production efficiency, the industry as a whole has not had any major technological improvements for years and the chances of large and rich discoveries, although not impossible, are diminishing. Finally, copper is highly competitive with other metals and is encountering increasing competition from aluminum. The company itself branched into the aluminum field with the construction of a new mill in 1954 for the manufacture of aluminum rods, wire, and cable which are made from refined aluminum produced at the Anaconda Aluminum Company plant at Columbia Falls.

#### Food and Kindred Products (SIC 20)

Food and kindred products is the second largest industry in manufacturing. Between 1950 and 1960 it increased in employment from 520 to 809 or 55.6 percent. Its relative position within total County employment increased slightly although its relative position within the State's food and kindred products industry was greater - 14.9 percent in 1950 and 19.1 percent in 1960. It is expected that 1981 employment will increase to approximately 1,165 persons.

The food and kindred products industry falls into three classifications: (1) that portion which serves local markets; (2) that which serves export markets; and, (3) that which serves both local and export markets. Examples of the first group include dairy and bakery products; examples in the second group are flour milling and feed grain products; the last group includes meat packing, and malt beverages.

#### Milling and Feed

Milling and feed producers are the largest single group

within food and kindred products, accounting for 355 employees. Milling is characterized by high raw material costs and low labor costs. Raw material is about 70 percent of production cost while labor is only 3 to 5 percent. Since wheat is an agricultural product, the size of the crop is irregular. Among the principal factors that influence the amount of the available supply are the acreage in cultivation, rainfall, plant diseases, the annual carryover, exports and domestic demand for feed. This makes for a highly complex combination of forces influencing the price of wheat which is subject to rather wide fluctuations.

In the past century there has been a decrease in per capita consumption of wheat flour. This decrease is indicative of the increase in the standard of living and is likely to continue as long as disposable income continues to increase. In the face of this decreasing per capita consumption pattern, only an increase in population will make it possible for the industry to maintain its production. Thus the drop in per capita consumption will be offset in part by the growth in population and by the efforts of mills to diversify by widening the range of their production to include products the demand for which is growing.

With increased export markets and increased production especially in the south and west, this segment of the industry should expand slightly by 1981.

#### Meat Packing

The meat packing group is the second largest employer in food and kindred products, employing approximately 150 persons. The trend of employment has been up in recent years and the firms interviewed for this study indicated favorable growth prospects based upon increased plant efficiency. Small employment increases should take place as a result of increased local population although export increases will be more difficult. This is due chiefly to the increased competition from large packers who have decentralized their operations in recent years by establishing packing houses closer to the sources of supply.

#### Beverages

Malt beverages and soft drinks account for approximately 130 employees. The Great Falls Brewery Company is the largest within this group employing about 100 persons. Its product is shipped to other parts of the State and neighboring States such as Wyoming, Idaho, North Dakota and Washington. The soft drink segment of the industry has also served areas immediately

adjacent to Cascade County although most of its sales are within the County. Employment should increase over the years to 1981.

#### Bakery and Dairy Products

These two groups are definitely oriented toward local markets although bakery products are shipped to outlying counties close to Great Falls in travel time. Employment should rise slightly with increased population and increased production.

#### Printing and Publishing (SIC 27)

The printing and publishing industry has shown continuous growth over the years. In 1960 it accounted for 576 employees, an increase of 94 percent from 297 employees in 1950. This is a growing industry on both a local and national scale and with increased business activity and population growth, employment should increase to approximately 725 persons.

#### Other Industries

Other industries include furniture, lumber and wood products; machinery; motor vehicles and vehicle equipment; transportation equipment; other durable goods; apparel and fabricated textile products; chemical and allied products; and other non-durable goods. Together these industries accounted for 505 employees in 1960. These are relatively small industries and since the Great Falls area has few distinct comparative advantages in these various industries the 1981 employment levels should increase to approximately 800 persons in 1981.

#### Conclusion

In conclusion, it is anticipated that manufacturing employment will increase moderately between now and 1981. No major new industries are expected to locate in the Metropolitan Area of the magnitude of The Anaconda Company. Of course this does not rule out the possibility of a large new industry locating here. Rather, the growth that will take place will be a rather steady expansion of existing industries. Some new industries in the food and kindred products category can be expected, particularly those that can process agricultural products grown in the region surrounding Great Falls.



Table 1

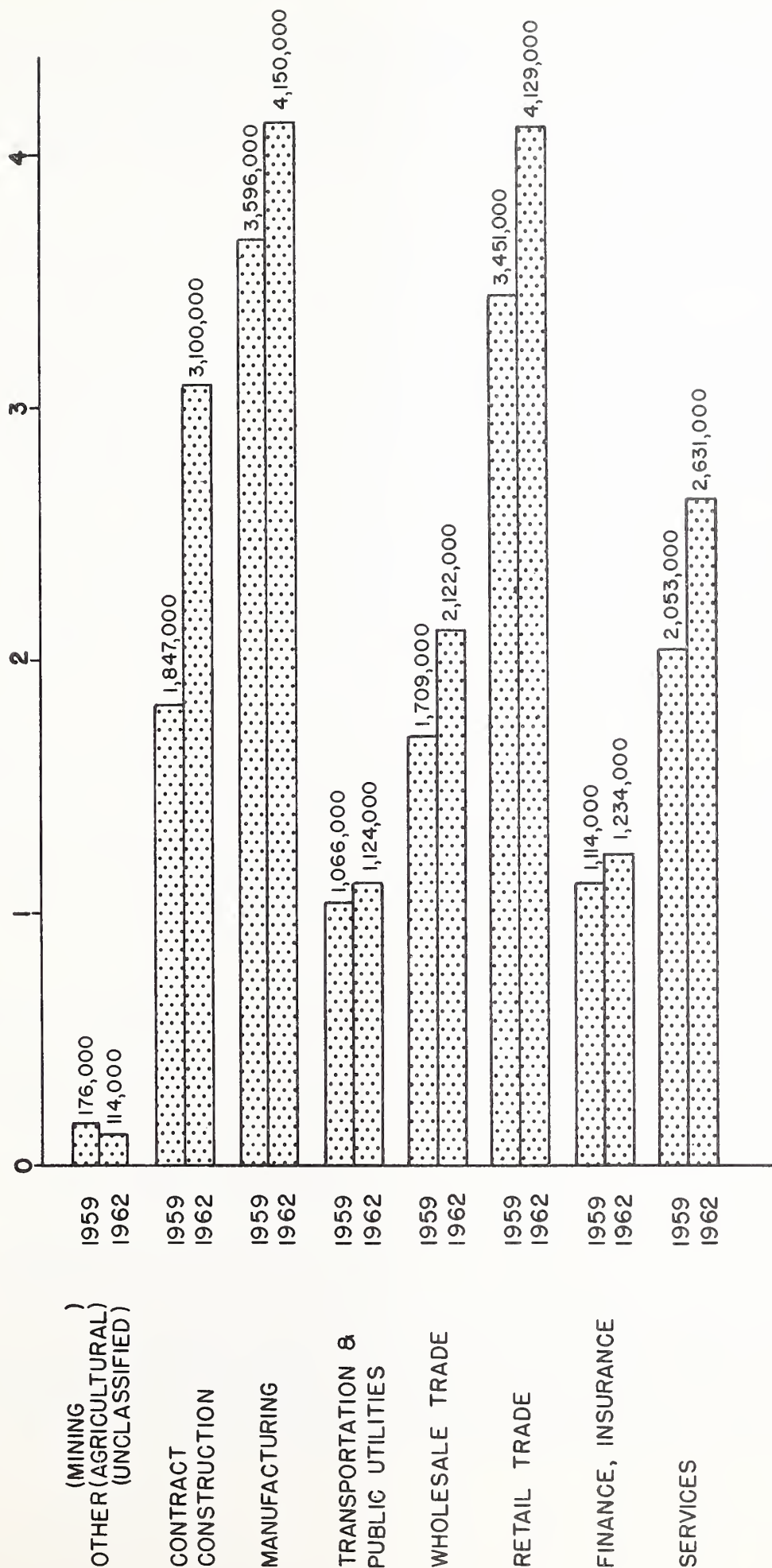
## SUMMARY OF PLUS AND MINUS FACTORS OF CASCADE COUNTY MANUFACTURING PROJECTIONS

Industry Group	Major Areas of Uncertainty	Plus Factors	Minus Factors	Outlook on Balance	1981 Employment
Primary & Fabricated Metals	1. Foreign competition. 2. U.S. economic conditions. 3. Supply of concentrates from foreign sources.	1. Increasing industrial demand in domestic and foreign markets. 2. Increased production diversification. 3. Recent expansion in production capacity.	1. Continued competition from other metals. 2. Increased production efficiency leading to decreasing labor requirements.	Employment levels should increase slightly above 1960 levels.	1,700
Food & Kindred Products	1. Weather as it affects agricultural raw materials production.	1. Expanding export markets in the west. 2. Close proximity to production areas. 3. Increasing population in local market.	1. Industry can capitalize on increased mechanization and reduced labor requirements.	Increased employment should result from expanding markets.	1,165
Printing & Publishing	1. Rate of technological change in production methods.	1. Expanding local and outside markets within the State.	1. Effect of technological change on employment.	Employment should increase but not as fast as in past years.	725
Other Manufacturing				Should stay fairly proportional to total manufacturing employment.	800
TOTALS					4,390

# TAXABLE PAYROLLS BY INDUSTRY GROUP

1959 8 1963

MILLIONS \$



SOURCE: U.S. DEPT. OF COMMERCE, BUREAU OF THE CENSUS, COUNTY BUSINESS PATTERNS, MONTANA, FIRST QUARTER 1962

## Wholesale and Retail Trade

Wholesale and retail trade was the largest single employer in Cascade County in 1950 and 1960. The employment dominance of this group can best be shown by the fact that it comprises almost 24 percent of Cascade County's 1960 labor force compared to the State's 20.3 percent.

As previously mentioned, Great Falls serves a rather extensive trade area in both wholesale and retail sales and has shown particularly strong growth in the former. The larger trade area represented by wholesaling bore out the analysis estimate that approximately 50 percent of wholesale trade employment is basic compared to only 26 percent for retail trade. Growth trends in the trade area outside of Cascade County show that the trade area has not been increasing as fast in population as either the County or the City. The Upper Midwest Economic Study in Trade Centers and Trade Areas of the Upper Midwest showed that the combined primary wholesale and retail trade areas for Great Falls increased only by 20.2 percent between 1950 and 1960 compared to 38.4 percent for Cascade County and 41.2 percent for Great Falls. Thus the local trade area is growing at a faster rate than the outlying trade area.

What this means in terms of future employment prospects is that local population growth will be more of a factor in increased trade employment than the outlying trade area growth. This is not to say however that the outlying trade area growth is not important but rather that as far as the future is concerned its importance will assume a smaller role in terms of total wholesale and retail trade.

It is anticipated that the basic portions of trade employment should decrease because of the increasing share that local population will comprise of the total trade area. Employment in 1981 should range from a low of 8,600 to a high of 8,800.

As Great Falls grows in both area and population there will probably be a certain amount of decentralization of retail establishments to the newly developing shopping centers. It is important that the Central Business District not be allowed to deteriorate as a shopping area because this will affect its attraction for outlying area trade. Modernization of stores, ease of access, and the adequate supply of off-street parking are vital to allow Great Falls to continue to serve as a regional shopping center for north-central Montana.



## Services

Service trades include such categories as business and repair services, household and personal services, entertainment and recreation services, educational services, welfare, religious and non-profit organizations, and hospitals and other professional and related services. This is the second most important industry in total employment, comprising 23.6 percent of the labor force in 1960. The growth in services between 1950 and 1960 showed strength with a 47 percent increase.

Trade area analysis revealed that approximately 15 percent of employment in this group can be considered basic or approximately 850 employees. Most of this basic employment can be found in specialized business and repair services, medical facilities including hospitals and clinics, professional services and educational services (College of Great Falls).

From the previous analysis of retail trade and selected services it was noted that selected service sales had a higher growth rate than retail sales. This was also true for the trend in employment growth. This indicates that people have been shifting their spending away from the purchase of goods toward services. This trend is expected to continue in the future and services are supposed to increase in relative importance.

On this basis service employment can be expected to range from 9,000 to 9,200 by 1981.

## Transportation, Communications and Utilities

Within this group, which has shown an overall decrease of 4.3 percent between 1950 and 1960, there are various sub-categories which include railroads, trucking and transportation, and communications and utilities. In actuality, it has been the railroad category that has experienced a loss in employment of 36.5 percent between 1950 and 1960. Trucking and other transportation had a slight increase of 4.6 percent while communications and utilities increased 52.6 percent.

### Railroad Transportation

The railroad industry in recent years has been negotiating on a national basis for reduction of certain personnel that they no longer consider essential to their operations, such as the railroad firemen. Their competitive position with other segments

of the transportation industry has, for example, declined with relation to trucking and air transportation. They have, however, benefited from the integration with truck transportation as in "piggy-backing". This is where a complete semi-trailer of freight is carried on a flat car. This trend toward freight integration can be expected to continue in the future so that freight tonnage will probably rise.

The effect upon employment will not be expected to cause an increase. This is chiefly due to the fact that continued technological changes such as automation in freight yards and traffic control will lower labor requirements. On the clerical side, improved systems and procedures through automation can be expected to reduce clerical and administrative requirements.

The conclusion is that railroad employment should remain about constant with present levels or about 900 employees.

#### Truck and Motor Transportation

This portion of the industry accounted for 520 employees in 1960. The continued improvement and construction of major highways, particularly the interstate system, should result in an increase in freight hauling and employment. This increase could be substantial if the trucking industry continues to make major inroads on rail transportation.

Another segment of the transportation industry that can be expected to grow in small but increasing numbers is local transportation. As the Great Falls area grows in population, more cabs, for example, can be expected. Since no public transportation exists at the present time, it can be expected that some form of mass transportation system, such as buses, will be in operation by 1981.

This category of transportation can be expected to increase to about 700 employees in 1981.

#### Air Transportation

There are approximately 250 employees that are engaged in air transportation in the Metropolitan Area. Information derived from interviews shows that the Great Falls International Airport is expecting a substantial growth in air travel and operations. In 1964 a total of 57,247 passengers enplaned at Great Falls and it is expected to increase to approximately 96,000 by 1975. Other growth factors include an increase in scheduled air

carrier aircraft departures from 4,736 in 1964 to 7,100 in 1975; an increase in general aviation aircraft based at the airport from 102 to 160 and an increase in total aircraft operations from 96,292 to 130,000 in 1975.

With air transportation assuming greater importance in the future, employment can be expected to increase to about 400 to 500 persons by 1981.

#### Communications and Utilities

In 1960, employment in this category accounted for 859 persons (this also includes sanitary services). The major employers, Montana Power Company and Mountain States Telephone account for the main share of employment or approximately 500 employees. Projection by both companies up to 1970 indicates an increase in power production as well as an increase in telephone subscribers. By 1970 Montana Power expects to be producing approximately 90,000 KW's, a significant increase from the 1964 figure of 51,000 KW's. Mountain States Telephone expects an increase in total subscribers from 22,750 in 1965 to approximately 25,000 by 1970 while the total number of telephones is expected to rise from 38,100 in 1965 to about 45,000 in 1970.

The effect of the increases upon employment will be more pronounced in the communications than in the utilities field. However, it is quite reasonable to expect a gain in employment because of the continued growth in business and population.

Employment in 1981 may be expected to increase from 859 to approximately 1,400. In total, transportation, communications and utilities can be expected to range from 3,400 to 3,500 by 1981.

#### Construction

Construction employment in 1960 totaled 2,078 persons, an increase of 42.6 percent over 1950 employment of 1,457. Construction has been a strongly growing industry as evidenced by its increasing relative position in the Cascade County labor force - 7.4 percent in 1950 and 8.6 percent in 1960. Employment in Cascade County has also been growing faster than that of the State. In 1940 Cascade County employment in construction was only 7.8 percent of the State total; in 1950 it was 9.9 percent and in 1960 it was 13.9 percent.



The large increase in construction employment could not be attributed to the Malmstrom missile construction because the growth has been of a long-term nature and the 1960 growth preceded the construction of the missile complex. Rather, it is a manifestation of general economic growth and population growth in the Metropolitan Area.

Construction employment should continue to grow in the area as a result of continued government spending, particularly for the military, and also for civilian agencies. Other factors pointing to continued increases in construction are the continuation of the Federal Interstate Highway Program which will last until 1972, although it is anticipated that other Federal highway programs will be authorized subsequent to 1972; and continued commercial, industrial and residential construction which will be generated by overall economic growth forces.

In conclusion, construction employment in 1981 should range from 3,900 to 4,000.

#### Finance, Insurance and Real Estate

This industry group accounted for 1,257 employees in 1960, an increase of 64 percent over the 766 employees in 1950. In terms of relative growth, finance, insurance and real estate increased from 3.9 percent of the labor force in 1950 to 5.2 percent in 1960. Its relative position in the State has stayed fairly stable since 1940, ranging from 15.9 percent of the State total in 1940 to 15.6 percent in 1960. Trade area analysis revealed that finance and insurance employment was approximately 10 percent basic.

Generally, these two industries are becoming highly automated in systems and procedures thus reducing the requirements for labor. Real estate employment should increase along with the growth in population. It is anticipated that continuing growth will take place in this industry with 1981 employment ranging from 2,500 to 2,600.

#### Government (Federal, State and Local - Civilian)

Employment in government showed a fairly strong increase from 1,042 in 1950 to 1,601 in 1960, an increase of 53.7 percent. A small increase in government's relative position also took place between 1950 and 1960 with a rise from 5.3 percent of total County employment to 6.6 percent. Government employment

showed a stronger relative increase when compared to State employment levels, having risen from 7.1 percent in 1940 to 10.3 percent and 12.7 percent in 1950 and 1960 respectively.

Government employment at all three levels has tended to show increases as a result of increased population and expanding governmental services and programs. This is particularly the case at the Federal level where growing employment can be expected. The same trend will also prevail with State and local government but to a lesser extent.

Employment in 1981 can be expected to range from 2,900 to 3,100.

### Other Industries

This group includes unclassified and "not reported" industrial employment. We have added two other industrial categories - forestry and fisheries, and mining - because of their low employment and because they are not significant in the overall economic picture. Mining, for example, employed 122 persons in 1950 and 121 in 1960, while forestry and fisheries employed 16 in 1950 and 21 in 1960.

Total employment in this overall category in 1960 was 776 or 3.2 percent of total employment while in 1950 employment totaled 402 or 2.0 percent of employment. Since this category has been increasing in relative importance it is expected that 1981 employment will range from 2,100 to 2,165.

### SUMMARY OF EMPLOYMENT PROJECTIONS FOR 1981 (Rounded to nearest 100)

<u>Industry</u>	<u>Low</u>	<u>High</u>
Agriculture	1,300	1,400
Construction	3,900	4,000
Manufacturing	4,300	4,400
Transportation, Communications & Utilities	3,400	3,500
Wholesale & Retail Trade	8,600	8,800
Finance, Insurance and Real Estate	2,500	2,600
Services	9,000	9,200
Government	2,900	3,100
Other Industries	<u>2,100</u>	<u>2,200</u>
TOTALS	38,000	39,200
MEDIAN	38,600	

CASCADE COUNTY POPULATION PROJECTIONS - 1981

Correlation of Population and Employment

In analyzing the growth of Cascade County's population and employment there is a correlation between the number of people employed and total population. This is called the labor participation rate - a figure which shows the percentage of people employed in relation to the overall population.

The long-term trend of Cascade County's labor participation rate has been decreasing. That is to say that the number of people employed have been supporting a growing number of people not employed. Following is a table showing this trend.

LABOR PARTICIPATION RATE FOR CASCADE COUNTY, 1930-1960

<u>Year</u>	<u>Population</u>	<u>Employment</u>	<u>Labor Participation Rate</u>
1930	41,146	17,628	42.8%
1940	41,999	15,053	35.8
1950	53,027	19,742	37.2
1960	73,418	24,184	32.9

The reason for the lower 1960 rate is undoubtedly due to the presence of Malmstrom personnel and their families in the population but their absence from the labor force (the employment figures are for civilians only). It is assumed that by 1981 the labor participation rate will decline slightly to 32 percent because of the continued growth of Malmstrom whose personnel will not be counted in the labor force.

By dividing the two employment estimates by 32 percent we are able to derive the following population projections.

	<u>Projected Employment</u>	<u>Projected Labor Participation Rate</u>	<u>1981 Projected Population</u>
Low Estimate	38,000	32%	118,750
High Estimate	39,200	32%	122,500



As a check on this procedure it was decided to include the projected Malmstrom personnel in the 1981 labor force. The estimated military employment for Malmstrom in 1981 is 6,000 persons, which means a total estimated employment ranging from 44,000 to 45,200. The labor participation would have to be adjusted since the ratio would have to go up to account for those employed in the military. In 1960 there were 4,187 persons in the armed forces which means a total employment of 28,371 (24,184 civilian plus 4,187 military). The 1960 labor participation rate therefore was 38.6 percent if the military is included. For 1981 a slight decline to 38 percent would be assumed which would mean a population range from 115,789, (44,000 divided by 38%), to 118,947, (45,200 divided by 38%). We prefer to base our projection on the former method, utilizing the civilian labor participation rate, since this is the one that employs longer historical trends. Taking the median between the two former estimates would indicate a 1981 population of 120,625.

#### Population Estimates from Other Sources

The Upper Midwest Economic Study in their report entitled Projected Urban Growth in the Upper Midwest: 1960-1975, have projected a 1975 population in Cascade County ranging from a low of 88,700 to a high of 102,700 and a probable estimate of 95,700. Extrapolating this growth trend to 1981 indicates a low population of 99,760, a high of 114,400 and a probable of 104,640.

An additional check was made with projections for the State of Montana and the United States by the U. S. Bureau of the Census in Current Population Reports, (Series P-25, February 1965, No. 301). Using series I-B which was the median projection and was based upon a moderate decline in fertility rates and on past state migration patterns, the projected 1981 U. S. population was 248,000,000 persons while the State projection was 865,000.

Cascade County has shown that over the long trend it has been increasing in its share of both State and U. S. population as shown in the following table.

#### CASCADE COUNTY POPULATION AS A PERCENTAGE OF MONTANA & U. S.

	<u>1930</u>	<u>1940</u>	<u>1950</u>	<u>1960</u>	<u>1981*</u>
Montana	7.65	7.51	8.97	10.88	14.5
U. S.	.033	.031	.035	.040	.049

\*Estimated

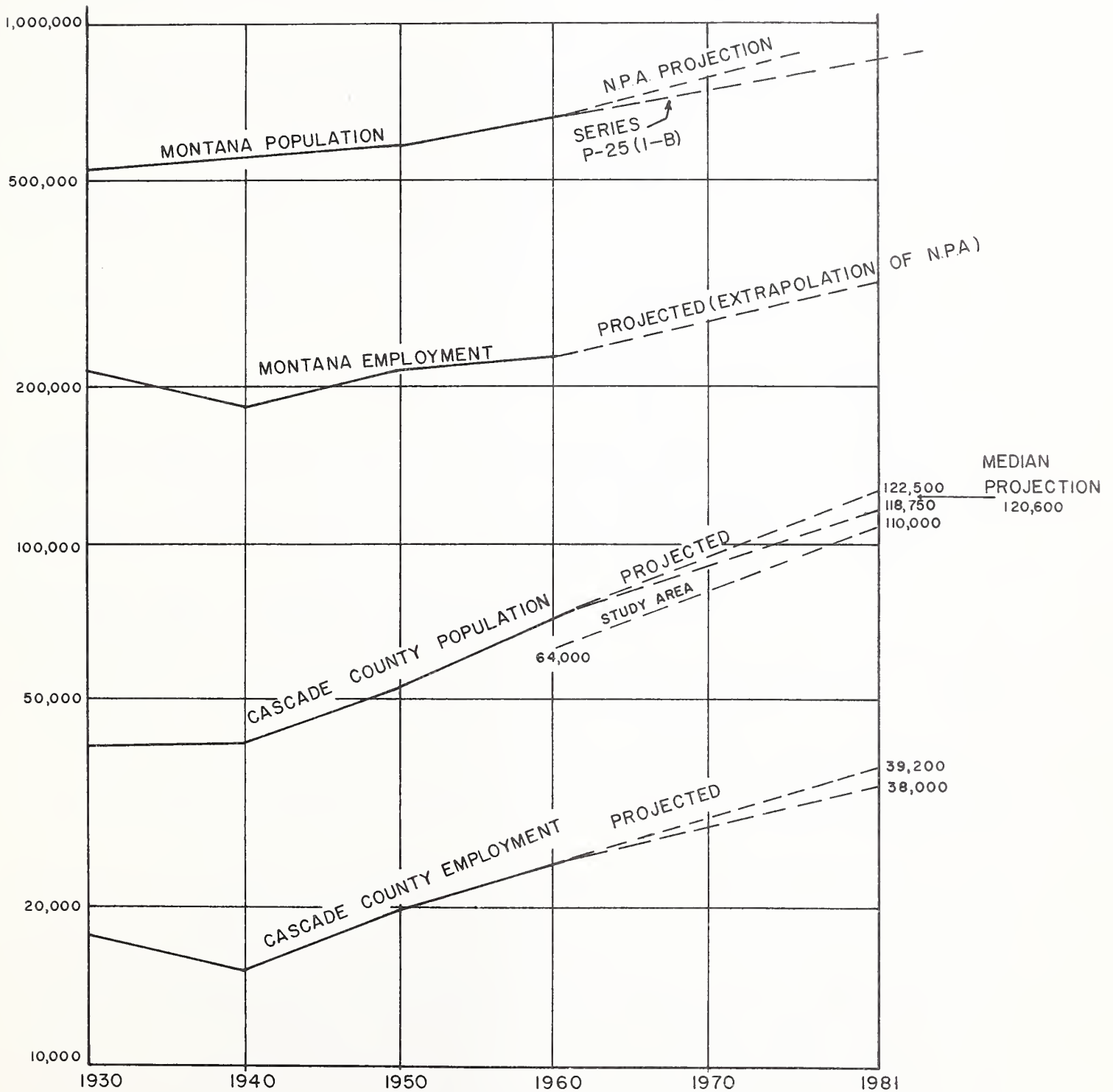
Multiplying the State projection of 865,000 by 14.5 and the U. S. projection by .049 gives a projected range with a high of 125,400 and a low of 121,500.

Thus it is felt that the economic study and the derived median projection of 120,625 provides a reasonable estimate of 1981 population that falls between the Upper Midwest Economic Study projections and the U. S. Census Bureau ratio projections. It is also felt that this is a reasonable estimate for transportation planning purposes.

In conclusion, the study area population should increase from 64,000 in 1960 to approximately 110,000 by 1981.

# COMPARATIVE POPULATION & EMPLOYMENT TRENDS & PROJECTIONS: 1930-1981

## MONTANA & CASCADE COUNTY





### Comparison with Other Projections:

In addition to the comparisons made with the Upper Midwest Economic Study, and Current Population Reports, U. S. Census, February, 1965, several comparisons were then made with studies and projections of other agencies:

Master Land Use Plan, 1958, Great Falls City-County Planning Board.

This study gave estimates for 1958 and projections to 1975, by the "step-down" method. Using the same annual average increase, these projections were extended to 1981 for comparative purposes:

	1958 <u>Estimate</u>	1975 <u>Projection</u>	1981 <u>Projection</u>
Cascade County	67,484	89,187	96,847
City of Great Falls	49,262	71,878	79,860

### U. S. Census, March, 1966 Projection.

This latest U. S. Census projection forecast a population of 121,000 for Great Falls in 1985. This was adjusted to 1981 by using the "urbanized area" 1960 population of 57,629 as the base year.

	1960 Census <u>Population</u>	1985 <u>Projection</u>	1981 Adjusted <u>Population</u>
Great Falls Urbanized Area	57,629	121,000	110,861

### Planning Survey Division, Montana State Highway Commission, September, 1965.

A very complete and detailed analysis of population trends was made by the Planning Survey Division as a part of Volume IV of the Great Falls Urban Transportation Survey. This analysis utilized the ratio or "step-down" method, whereby projections of Montana and U. S. population by the U. S. Census were utilized to project population of Great Falls and Cascade County. The percentage relationship between Montana and the U. S. population was plotted from 1890 to 1960, and projected to 1981. Similarly, the percentage relationship between Cascade County and Montana was plotted from 1890 to 1961, and projected to 1981. Last, the percentage relationship between the Study Area and Cascade County was projected from 1960 and 1961 to 1981. The following projections were then derived:

	<u>1960 Population</u>	<u>1981 Projection</u>
Cascade County	73,418	126,000
Great Falls Study Area	64,000	114,000

These projections were reviewed with local utilities companies and other agencies by Planning Survey personnel and the City-County Planning Board, and were found to correlate very closely.

After a careful review, it was felt by Small, Cooley and Associates that the Planning Survey projections had been accurately prepared by the ratio method.

The following table summarizes the various projections discussed:

POPULATION PROJECTIONS

	<u>1981 Cascade County</u>	<u>1981 Great Falls</u>
1. 1958 Planning Board Projections	96,847 <sup>1</sup>	79,860 <sup>2</sup>
2. Upper Midwest Economic Study	104,640 <sup>3</sup>	94,699 <sup>4</sup>
3. Small, Cooley and Associates Economic Projections	120,625	110,000
4. U. S. Census, March 1966 Projection		110,861 <sup>5</sup>
5. Derived from "Current Population Reports," U. S. Census, Feb. 1965	123,450	111,722 <sup>4</sup>
6. Montana State Highway Department Projection	126,000	114,000

\* \* \* \* \*

- <sup>1</sup> The actual projection was 89,187 to 1975. This was extended to 1981.
- <sup>2</sup> The actual projection was 71,878 to 1975. This was extended to 1981.
- <sup>3</sup> The actual projection was 95,700 to 1975. This was extended to 1981.
- <sup>4</sup> Derived by multiplying County figure by 90.5%.
- <sup>5</sup> The actual projection was 121,000 to 1985. This was adjusted to 1981.

Population Projections Correlated with Land Use Projections

In order to obtain population figures for O-D Zones and Neighborhood Units to correlate with the 1964 Land Use Statistics, the following procedure was followed:

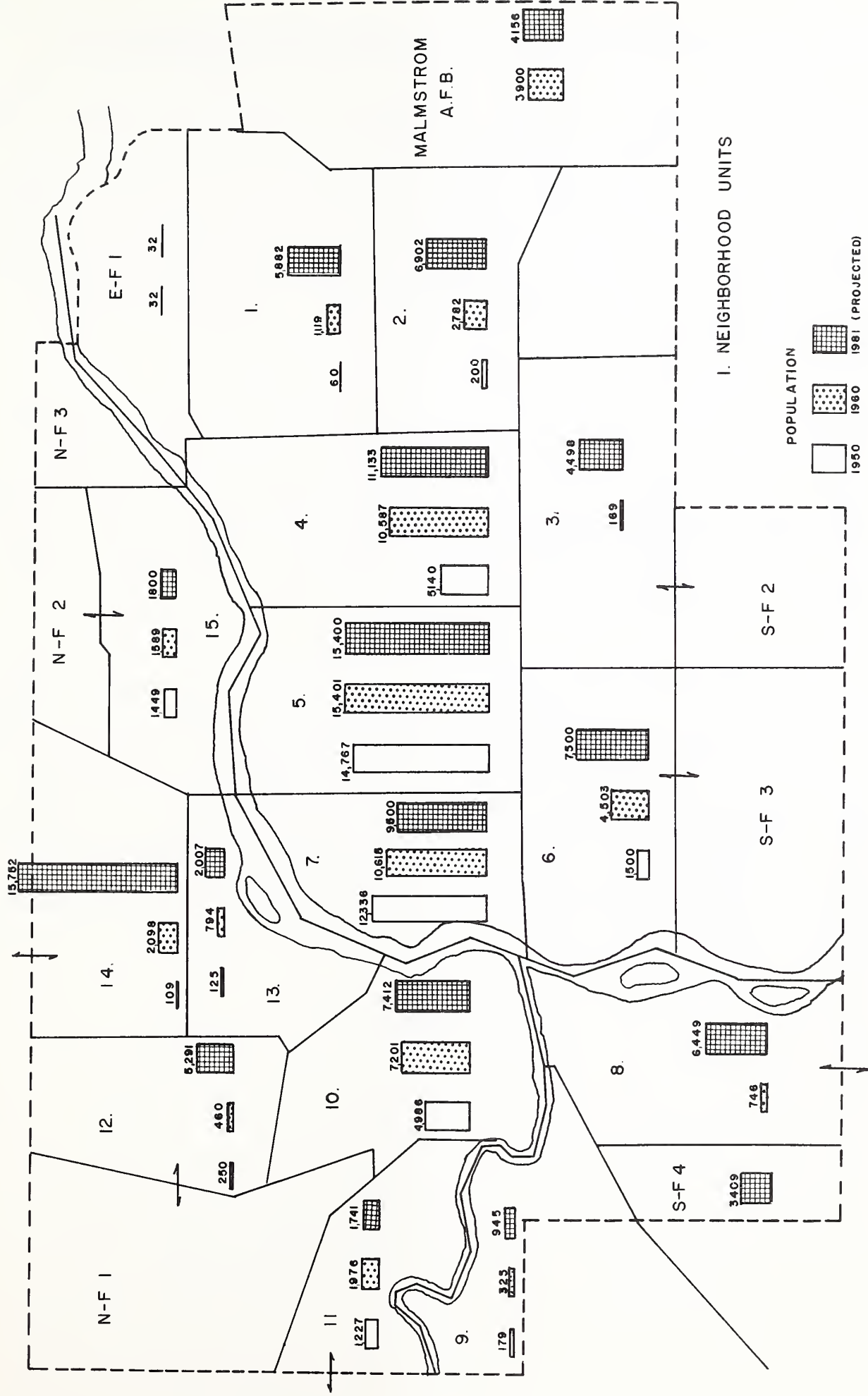
1. Overall population estimates as of 1964, prepared by the Great Falls City-County Planning Board and the Chamber of Commerce were reviewed.
2. 1960 population was derived for each block from the 1960 Census.
3. From the Building Inspector's records, new residential building permits were recorded for each dwelling unit for each block for 1961, 1962, 1963 and 1964. Dot maps showing new construction by number of dwelling units for each year, 1950 through 1965, have been prepared by the City-County Planning Board and are available in that office.
4. Total population for 1964 was derived for each block, each O-D Zone and each Neighborhood Unit for planning purposes.
5. Following the projections of land use, described in the following section, population projections for each O-D Zone and each Neighborhood Unit were made for five-year periods from 1964.

The following chart summarizes population for the various neighborhood units for 1950, 1960, and 1981.



# GREAT FALLS

## URBAN TRANSPORTATION STUDY AREA



Review of U. S. Census and Other Population Information

Available information from the 1950 Census and the 1960 Census was studied in order to derive helpful information pertaining to the land use projections, population projections for the various parts of the City, and overall helpful trend information. In 1950, the Metropolitan Area was divided into enumeration districts, and information is available for population, number of dwelling units, and number of occupied dwelling units for each enumeration district. A breakdown as to sex and age was available only for groupings of enumeration districts in 1950.

Unfortunately, in 1960 the enumeration districts were completely changed, making a comparison impossible. However, in 1960 block statistics were available for the following items: population, number of housing units by condition and plumbing, occupied housing units by owner-occupied and renter-occupied, average dollar value, number of rooms, amount of rent, number occupied by non-white persons, and average number of persons per room.

The information available in the Assessor's Office and Reclassification Office was also reviewed. Assessment figures were available for individual parcels and for the entire school district (Great Falls plus approximately three miles into the County). No breakdown is available by block or subdivision. Also, a few years ago, assessment procedures were changed, making comparisons on a parcel basis very difficult. Overall assessments as given in the report Economic Impact of the Growth of 10th Avenue South Upon the Economy of Great Falls, Montana, 1940-1964, are reviewed in the appendix. Other pertinent Census information follows:

AGE DISTRIBUTION, 1950 & 1960 - CASCADE COUNTY

	<u>1950</u>	<u>1960</u>	<u>1950-1960 Change</u>	<u>Percent</u>
All Ages	53,027	73,418	20,391	38%
0-5	6,342	10,221	3,879	61%
5-9	4,617	8,293	3,676	80%
10-14	3,600	6,745	3,145	87%
15-19	3,357	4,980	1,623	48%
20-24	4,229	5,673	1,444	34%
25-29	4,602	5,396	794	17%
30-34	4,502	4,950	448	10%
35-39	4,059	4,903	844	21%
40-44	3,410	4,627	1,217	36%
45-49	2,752	4,040	1,288	47%
50-54	2,541	3,142	601	24%
55-59	2,485	2,583	98	4%
60-64	2,321	2,185	-136	-6%
65-69	1,884	2,051	167	9%
70-74	1,084	1,765	681	63%
75-84	1,044	1,601	557	53%
85+	198	263	65	33%

Source: U. S. Census Data



POPULATION, HOUSEHOLDS, RACIAL CHARACTERISTICS  
FOR GREAT FALLS - 1950 & 1960

	1950 Great Falls <u>Urban Place</u>	1960 Great Falls <u>Urban Place</u>	1960 Great Falls <u>SMSA</u>
Total Population	39,214	55,357	73,418
Households	12,202	17,613	22,187
Population in Households	36,856	54,584	71,103
Population Per Household	3.02	3.10	3.20
In Group Quarters	2,358	773	2,315
Male	19,589	27,419	37,444
White	19,404	26,974	36,609
Negro	78	168	334
Other	107	277	501
Female	19,625	27,938	35,974
White	19,457	27,457	35,250
Negro	75	197	183
Other	93	119	541

Source: U. S. Census Data

INCOME OF FAMILIES, GREAT FALLS URBAN PLACE

	<u>1950</u>	<u>1960</u>	<u>Growth</u>	<u>Percent</u>
All Families	10,435	14,090	3,655	35%
Under \$1,000	680	340	-	-
\$1,000 - \$1,999	625	667	42	-
\$2,000 - \$2,999	1,500	913	-	-
\$3,000 - \$3,999	2,465	1,179	-	-
\$4,000 - \$4,999	1,820	1,555	-	-
\$5,000 - \$5,999	1,085	1,903	818	75%
\$6,000 - \$6,999	550	1,896	1,346	244%
\$7,000 - \$9,999	625	3,487	2,962	473%
\$10,000 and over	500	2,150	1,650	430%
Not reported	585			
Median Income - Families	\$3,835	\$6,257	\$2,422	63%
Median Income - Families & Unre- lated Individuals	\$3,281	\$5,391	\$2,110	64%

Source: U. S. Census Data





APPENDIX



## MANUFACTURING

FIRM \_\_\_\_\_

ADDRESS \_\_\_\_\_

1. How many employees in Cascade County facilities? \_\_\_\_\_
2. What proportion of sales go outside Cascade County? \_\_\_\_\_
3. What changes in markets (here or elsewhere) are most important to your future operations?

4. How far out does your sales market extend from Great Falls?

(Please list the town and circle your trade area on the enclosed map)

North \_\_\_\_\_ East \_\_\_\_\_

South \_\_\_\_\_ West \_\_\_\_\_

5. What are your major purchases, other than labor, that you get locally?
6. What are your firm's plans or prospects for expansion (or contraction)?
7. What major factors limit your trade area? (Please check most important)

Transportation costs \_\_\_\_\_ Competitor's location \_\_\_\_\_

Transportation time \_\_\_\_\_ Span of Management control \_\_\_\_\_

Ability to service \_\_\_\_\_ Company policy \_\_\_\_\_

Personal preference \_\_\_\_\_ Other \_\_\_\_\_

8. What are the encouraging factors for expansion?
9. What are the major obstacles to expansion?
10. Approximately what is your average annual sales volume? \_\_\_\_\_
11. Miscellaneous comments.





\*Note: This map does not reflect the national and regional scope of various companies such as Anaconda, Montana Vegel. Oil & Feed, General Mills, Montana Flour Mills, Needham Packing, and Gt. Falls Brewery.

\*Note: This map does not reflect the national and regional scope of various companies such as Anaconda, Montana Vegal. Oil & Feed, General Mills, Montana Flour Mills, Needham Packing, and Gt. Falls Brewery.



## RETAILING

FIRM\_\_\_\_\_

ADDRESS\_\_\_\_\_

1. What is the extent of the trade or service area of your business?

(Please list the town and circle your trade area on the enclosed map)

North\_\_\_\_\_ East\_\_\_\_\_

South\_\_\_\_\_ West\_\_\_\_\_

2. What proportion of your business is in Cascade County?\_\_\_\_\_

3. What proportion of your business is outside Cascade County?\_\_\_\_\_

4. How many employees do you have? Full time\_\_\_\_\_

Part time\_\_\_\_\_

5. What has been your sales trend over the past 5 years?

6. Approximately what did you gross last year?\_\_\_\_\_

7. What are the major problems you are now facing?

8. What volume do you expect to do 5 or 10 years hence?\_\_\_\_\_

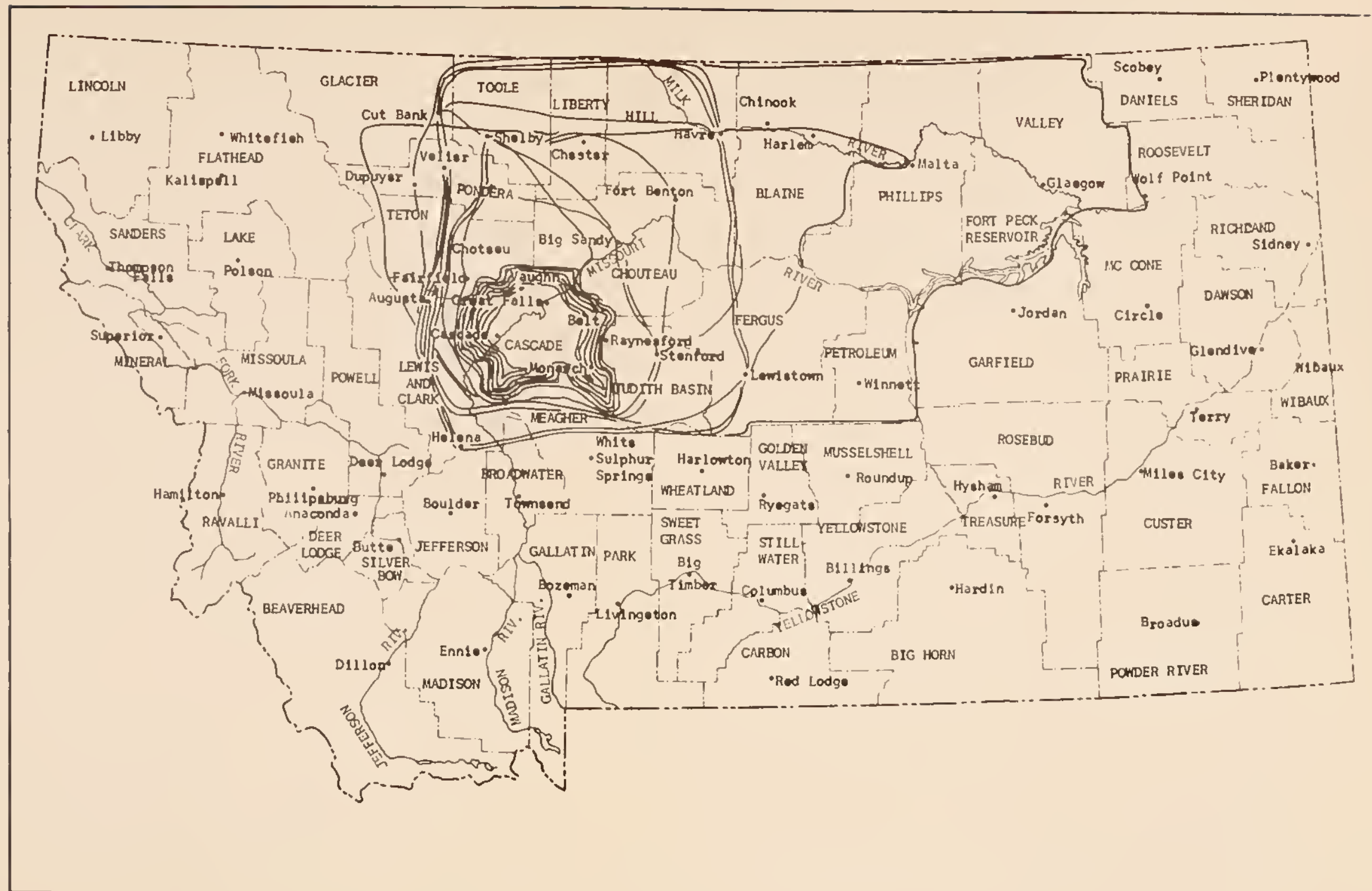
9. Are there any factors, economic or otherwise, that you feel affect your business?

10. Miscellaneous comments.





# RETAILING TRADE AREA





## WHOLESALING

FIRM \_\_\_\_\_

ADDRESS \_\_\_\_\_

1. How many employees in Cascade County facilities? \_\_\_\_\_
2. What proportion of sales go outside Cascade County? \_\_\_\_\_
3. What changes in markets (here or elsewhere) are most important to your future operations?
4. How far out does your sales market extend from Great Falls?  
(Please list the town and circle your trade area on the enclosed map)

North \_\_\_\_\_ East \_\_\_\_\_

South \_\_\_\_\_ West \_\_\_\_\_

5. What are your major purchases, other than labor, that you get locally?
6. What are your firm's plans or prospects for expansion (or contraction)?
7. What major factors limit your trade area? (Please check most important)

Transportation costs \_\_\_\_\_ Competitor's location \_\_\_\_\_

Transportation time \_\_\_\_\_ Span of Management control \_\_\_\_\_

Ability to service \_\_\_\_\_ Company policy \_\_\_\_\_

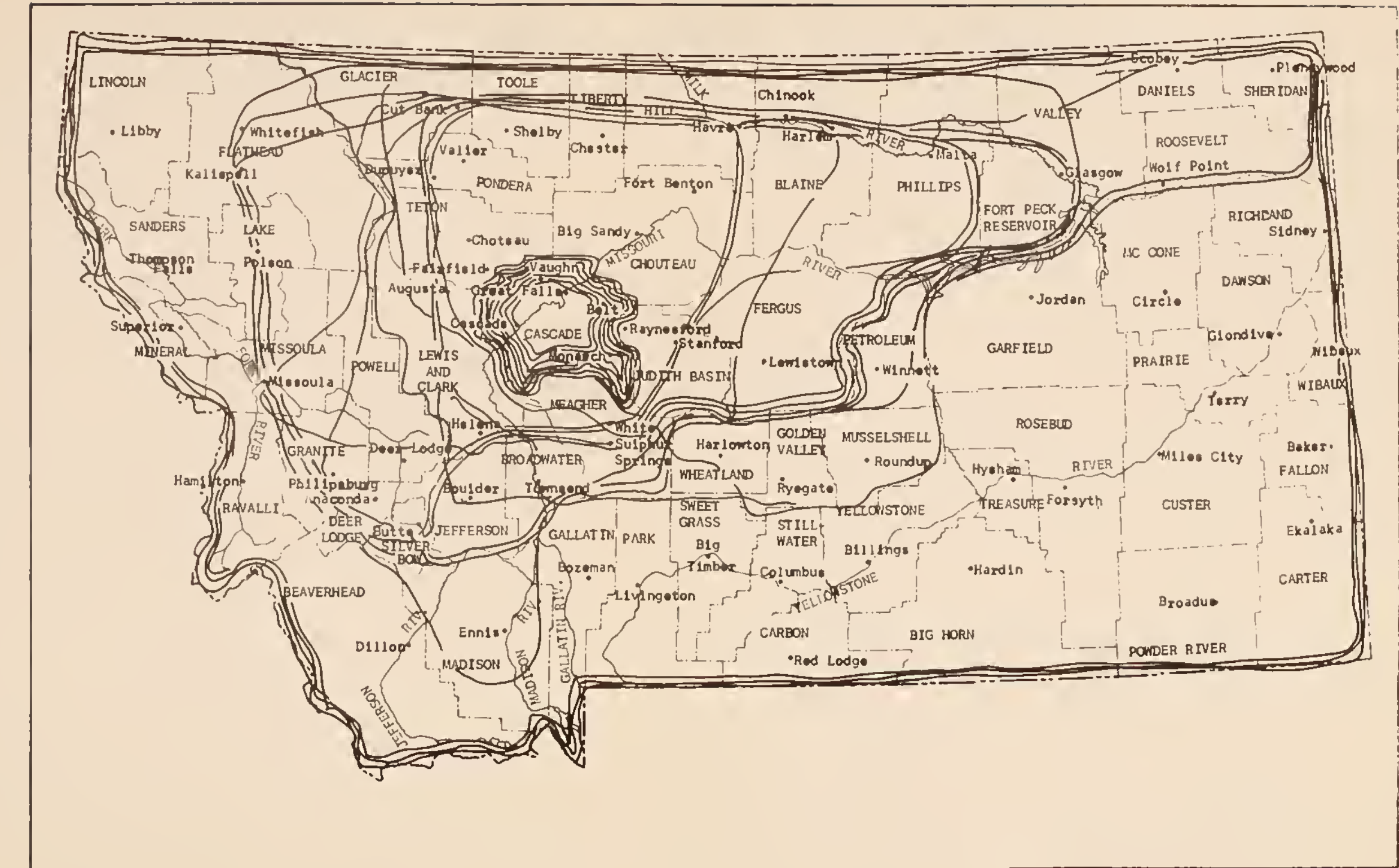
Personal preference \_\_\_\_\_ Other \_\_\_\_\_

8. What are the encouraging factors for expansion?
9. What are the major obstacles to expansion?
10. Approximately what is your average annual sales volume? \_\_\_\_\_
11. Miscellaneous comments.





WHOLESALE		TRADE		AREA	
1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30
31	32	33	34	35	36
37	38	39	40	41	42
43	44	45	46	47	48
49	50	51	52	53	54
55	56	57	58	59	60
61	62	63	64	65	66
67	68	69	70	71	72
73	74	75	76	77	78
79	80	81	82	83	84
85	86	87	88	89	90
91	92	93	94	95	96
97	98	99	100	101	102
103	104	105	106	107	108
109	110	111	112	113	114
115	116	117	118	119	120
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385	386	387	388	389	390
391	392	393	394	395	396
397	398	399	400	401	402
403	404	405	406	407	408





## FINANCE, INSURANCE, REAL ESTATE

FIRM \_\_\_\_\_

ADDRESS \_\_\_\_\_

1. What is the extent of the trade or service area of your business?

(Please list the town and circle your trade area on the enclosed map)

North \_\_\_\_\_ East \_\_\_\_\_

South \_\_\_\_\_ West \_\_\_\_\_

2. What proportion of your business is in Cascade County? \_\_\_\_\_

3. What proportion of your business is outside Cascade County? \_\_\_\_\_

4. How many employees do you have? Full time \_\_\_\_\_

Part time \_\_\_\_\_

5. What has been your sales trend over the past 5 years? \_\_\_\_\_

6. Approximately what did your firm gross last year? \_\_\_\_\_

7. What are the major problems you are now facing?

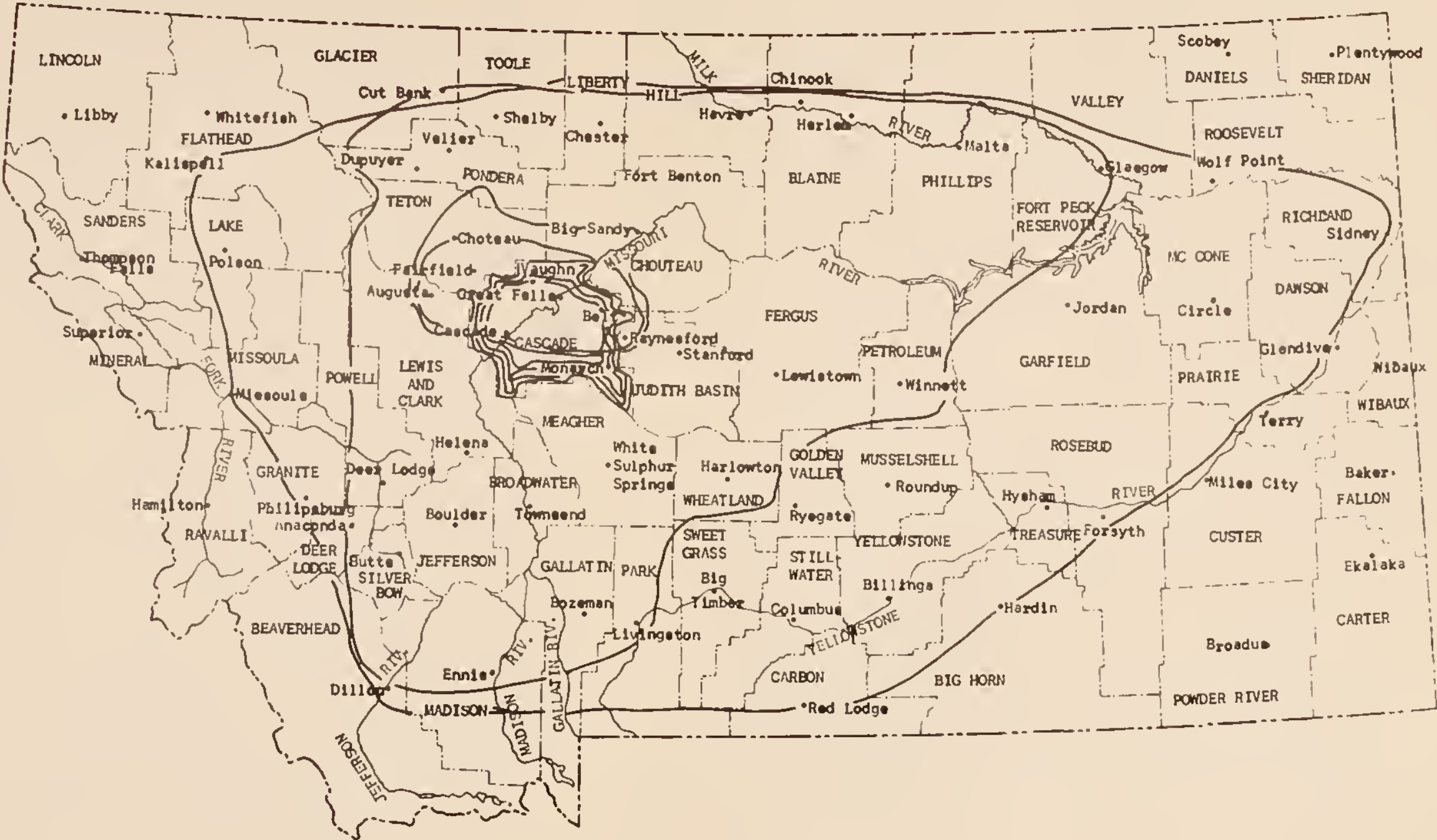
8. What volume do you expect to do 5 or 10 years hence? \_\_\_\_\_

9. Are there any factors, economic or otherwise, that you feel affect your business?

10. Miscellaneous comments.









(thousands of dollars)

Assessed Valuation in Cascade County By Classes  
of Property By Selected Years, 1940-1964

Year	Total	Land and Improvements	Public Utilities	Personal Property	Livestock	Net Proceeds of Mines
1940	\$ 94,859	\$ 48,677	\$24,825	\$19,757	\$1,502	\$97
1945	94,121	47,302	24,966	18,688	3,068	97
1950	134,029	55,122	26,473	49,372	3,018	45
1955	170,041	72,040	28,506	65,084	4,410	1
1960	220,719	105,047	33,086	79,142	3,442	a/
1964	248,910	123,040	38,299	83,924	3,646	a/

a/ Less than \$500.

(thousands of dollars)

Assessed Valuation in City of Great Falls by Classes  
of Property By Selected Years, 1940-1964

Year	Total	Land and Improvements a/	Public Utilities b/	Personal Property
1940	\$ 44,714	\$ 36,974	\$1,611	\$ 6,129
1945	42,328	35,229	1,505	5,594
1950	71,934	55,764	1,759	14,411
1955	96,342	69,367	2,454	24,521
1960	139,251	103,102	2,281	33,869
1964	161,153	121,633	5,388	34,131

a/ Includes Public Utilities assessed by the County Assessor.

b/ Public Utilities assessment allocated by the State Board of Equalization.

(thousands of dollars)

Real Property\* Relationship of Cascade County  
and City of Great Falls By Selected Years, 1940-1964

Year	Cascade County	City of Great Falls	% City Of County
1940	\$ 73,502	\$ 38,585	52%
1945	72,268	36,734	51%
1950	81,595	57,523	70%
1955	100,546	71,821	71%
1960	138,133	105,383	76%
1964	161,339	127,021	79%

\* Land and Improvements, and Public Utilities

Above tables taken from Economic Impact of the Growth of Tenth Avenue South Upon the Economy of Great Falls, Montana, 1940-1964.



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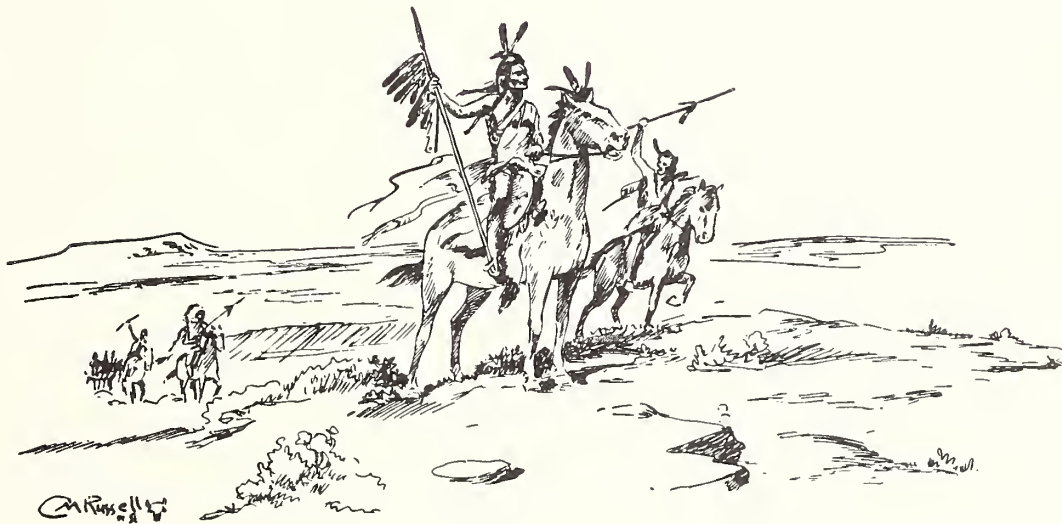
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19. \_\_\_\_\_, 1930, 1940, 1950 and 1960 Census of Population, Montana.
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21. \_\_\_\_\_, and the Department of Health, Education and Welfare, County Business Patterns, "Mountain States," 1959 and 1962.

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# LAND USE STUDY

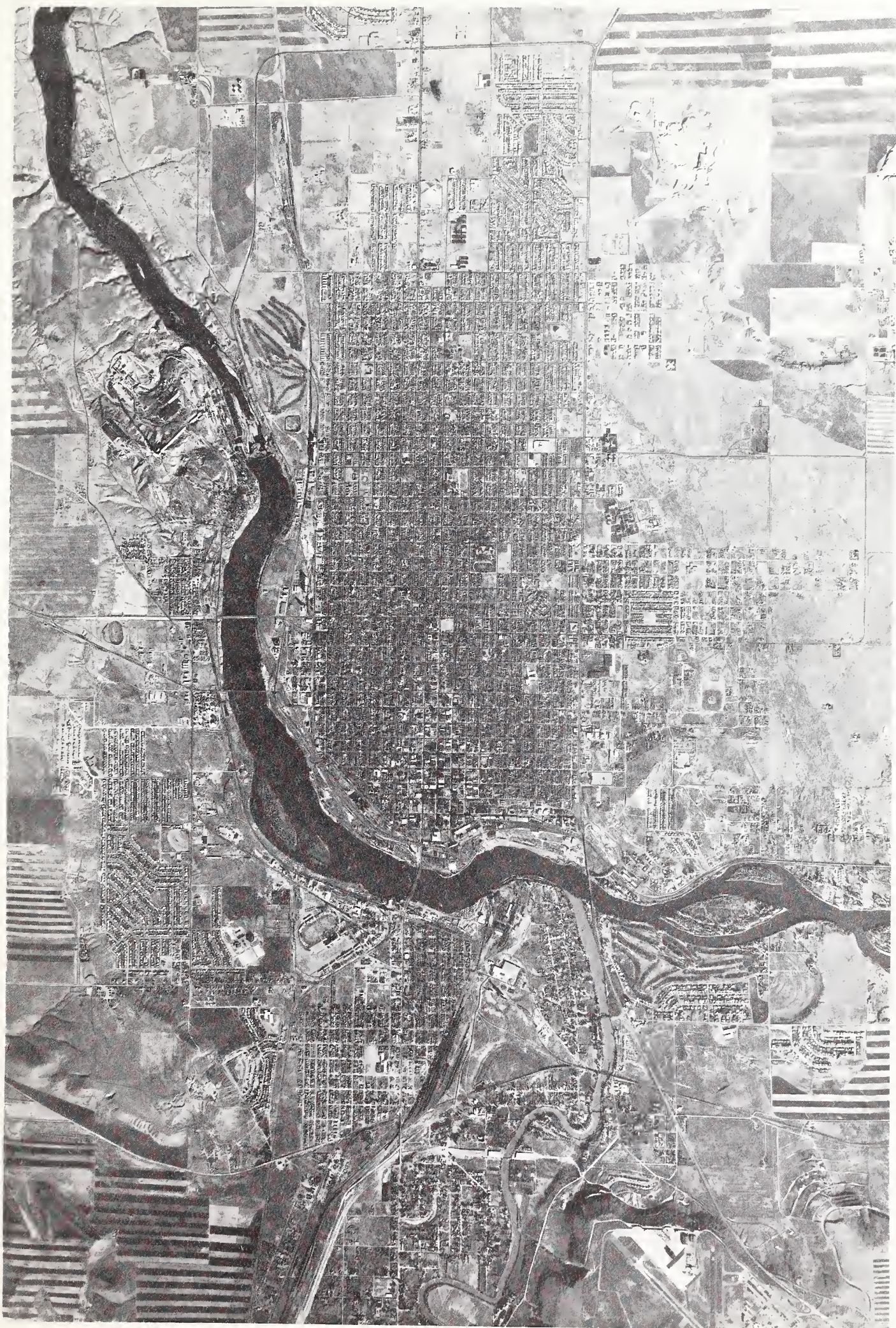


FOR  
THE GREAT FALLS CITY — COUNTY PLANNING BOARD  
AND  
THE MONTANA STATE HIGHWAY COMMISSION  
PLANNING SURVEY DIVISION  
IN COOPERATION WITH  
THE U.S. DEPARTMENT OF COMMERCE  
BUREAU OF PUBLIC ROADS











## INTRODUCTION

This Land Use Study is a continuation of the Cooperative Transportation Planning Process described in the Introduction to the Economic Study. The purpose of this study is to translate the Economic and Population Studies and Projections into Land Use, and to develop a Land Use Plan for transportation planning and other purposes.

The "base year" for this study is 1964, the date of the complete parcel-by-parcel land use survey by the City-County Planning Board staff. Projections are made in five-year stages, to 1969, 1974, 1979, and the "target year," 1981.

This work has been a cooperative project, utilizing the efforts and knowledge of the City-County Planning Board staff, a number of departments of the City of Great Falls and Cascade County, the Planning Survey Division of the Montana State Highway Commission, a number of other organizations and individuals, and the consultant, Small, Cooley and Associates.

This Land Use Plan was developed with full consideration of other necessary factors of community growth - roadways, utilities, community facilities such as schools, parks and recreational facilities, physical factors, and trends of development. The information gathered in the economic survey interviews was also of great assistance.

Probably the single most important recommendation with regard to this Land Use Plan is that it be kept up to date. No plan can be considered perfect or fixed. It should always reflect the current thinking of City, County and State agencies concerned with the development of Great Falls, as well as the School District, private industry, developers, and many others. In summary, the Land Use Plan should become a "working tool" that is always available for reference and use. This procedure will greatly facilitate the overall updating and review procedures at five-year periods in the Transportation Study process.

As time goes by, new and improved techniques will become available in transportation planning and land use planning. These should be incorporated wherever possible. Finally, the spirit of cooperation in the planning process that is presently evident among City, County, State and other agencies must be continued and improved wherever possible.

I

LAND USE SURVEY DATA

as of September, 1964



# GREAT FALLS TRANSPORTATION STUDY

## LAND USE SURVEY AND INVENTORY

\* \* \* \* \*

### METHODS USED FOR THE LAND USE SURVEY AND INVENTORY

Compilation of up-to-date land use information on a parcel basis was begun in May, 1964. The existing Great Falls City-County Planning Board Neighborhood Unit Maps were utilized. The 1958 land use maps were up-dated to existing conditions as of July, 1965. All land use information was field validated by personnel from the City-County Planning Board. The survey was made using a Land Use Code which was approved by the Montana State Highway Department and the Bureau of Public Roads.

Following the completion of the Land Use Survey the Land Use Inventory was performed. The information was compiled by O-D Zones, Neighborhood Units, and for the entire Study Area. The Cordon and District boundaries, as established in the 1961 survey, were also used. Working from data on the Neighborhood Unit Land Use Maps, land areas by land usage were computed. The floor and parking areas were obtained from the records of the County Reclassification Office, Sanborn Maps and/or aerial photographs. Tabulation of the land, floor and parking areas was done on "Land Use" sheets.

The computation of areas for each zone was done in the following manner:

- 1) For zones with boundary lines in the rivers, water area was not counted or used in total or net areas for the zones. The tally sheet for the 100 zones does not include river area.
- 2) Land Areas were taken from plats where available, or scaled from the 1" = 300' Neighborhood Unit Land Use Maps.

DISTRICT: One of the 24 O-D Zone Districts is given.

ZONE: One of the 100 O-D Zones as established by the Highway Department.

TOTAL AREA: This is the total area within the zone boundary line.

NET AREA: This is the total area minus the developed street and alley right-of-way area.

- 3) The residential land area is the total area of all lots and tracts of land as colored on the maps.
- 4) All Floor Areas were taken from County Reclassification Office records, Sanborn Maps or aerial photos.
- 5) Only the part of Malmstrom Air Force Base Land Area which falls within the study area was included in Zone 7801.
- 6) All alley and street areas are right-of-way areas.
- 7) A Mixed Use category was initiated for usage where there was more than one use in the same building. This category was used in Zones 7306, 7308, 7310 and 7414.
- 8) One-Family Housing Units include all single-family structures and separate house trailers on lots. The other residential categories are self-explanatory. See the Land Use Code for a complete listing of residential categories.

The Commercial category has the six separate categories, plus parking lots. The Land Use Code gives a description of the land uses under each category. Intensive Business also included restaurants, drive-in restaurants and recreational facilities. General Business also included all commercial uses which would not be in the other six categories.

The Industrial categories are (a) Light Industry, non-manufacturing; (b) Heavy Industry, manufacturing; and (c) Railroads and Public Utilities. Only railroad right-of-way was tabulated on the Land Use sheets.

The Public categories are self-explanatory. The Public School land use was put under the Public Buildings category. The Church and Semi-Public categories are self-explanatory.

The Vacant Land category lists all vacant land within the City Limits and County which is within the study area. Vacant land in the County is in the "Not Zoned" category. Vacant Land within the City Limits is under the "Zoned" category. Undeveloped streets, alleys and parks have also been listed in the Vacant Land category.

The Rights-of-Way category gives only the area of developed streets and alleys. These figures are right-of-way areas in acreage.

The Mixed Use category lists usages of different types in the same building.

Following the tabulation of each of the 100 separate zone sheets, a total summary sheet was made for the 100 Zones (24 Districts). The total area and net area on each zone were computed by adding the acreage for all usages in the zone. The total area, net area, square footages, etc., for the whole study area of 100 zones were arrived at by using square footages.

The tally sheet, computed by square footage rather than acreage, gives the following acreages:

<u>TOTAL AREA</u>	<u>NET AREA</u>	<u>RIGHT-OF-WAY AREA</u>
20,424.83 Acres	17,705.45 Acres	2,719.38 Acres

The difference of 3.35 acres is due to rounding off square footage to acreage.

SUMMARY SHEET FOR 1964 LAND USE INVENTORY

(Great Falls Study Area Land Use As Of September 1964)

TOTAL LAND USE INVENTORY FOR 24 DISTRICTS OR 100 ZONES IN THE STUDY AREA. (SEE MONTANA STATE HIGHWAY COMMISSION URBAN TRANSPORTATION SURVEY OF GREAT FALLS, MONTANA - VOLUME II - 1961, FOR BREAKDOWN OF ZONES, DISTRICTS AND CORDON BOUNDARY OF STUDY AREA.)

\* \* \* \* \*

L A N D    U S E

DISTRICT 24 Districts A through X

BLOCK NO. All Blocks and Parcels of Land

ZONE 100 Zones - 6101 through 8202

TOTAL AREA 20,424.83 Acres

NET AREA 17,705.45 Acres

RIGHT-OF-WAY AREA 2,719.38 Acres

1. RESIDENTIAL:<sup>1</sup>

## DWELLING

UNITSAREA (ACRES)

Number of (a) One-Family Housing Units	13,502	2,960.37
(b) Two-Family Housing Units	2,276	331.13
(c) Three or More Family Units	4,500	137.07
(d) Motel Units	780	27.77
(e) Trailer Court Units	644	68.04
(f) Hotel Units	<u>401</u>	<u>1.12</u>
Sub-total	20,802	3,525.50

<sup>1</sup> The dwelling unit numbers include Malmstrom Air Force Base on-base and off-base housing units. The land area does not include the on-base housing areas. The land area does include Malmstrom off-base (Off-base Wherry and Off-base Capehart) housing.



2. COMMERCIAL:

	<u>LAND AREA</u>		<u>FLOOR AREA</u>		<u>PARKING AREA</u>	
	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>
Local Business	467,069	10.72	154,621	3.55	50,270	1.15
Intensive Business <sup>2</sup>	7,197,346	165.23	688,641	15.81	3,046,352	69.94
General Business <sup>3</sup>	5,554,187	127.50	1,523,230	34.97	1,061,048	24.36
Shopping Centers	1,450,694	33.30	422,659	9.70	664,957	15.27
Department Stores	45,000	1.03	132,355	3.04	1,500	.03
Offices and Banks	777,782	17.86	398,544	9.15	291,179	6.68
Parking Lots <sup>4</sup>	<u>228,875</u>	<u>5.26</u>	<u>0</u>	<u>0</u>	<u>228,875</u>	<u>5.26</u>
Sub-total	15,720,953	360.90	3,320,050	76.22	5,344,181	122.69

<sup>2</sup> The Intensive Business breakdown includes the Malmstrom A.F.B. BX Gasoline Station.

<sup>3</sup> The General Business breakdown includes the Malmstrom A.F.B. Commissary and BX.

<sup>4</sup> The Parking Lot category is composed primarily of municipal parking lots.

3. INDUSTRIAL:

	<u>LAND AREA</u>		<u>FLOOR AREA</u>		<u>PARKING AREA</u>	
	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>
Light Industry	16,966,533	389.50	3,133,686	71.94	2,332,950	53.55
Heavy Industry	33,655,016	772.61	1,513,006	34.73	1,039,593	23.87
Railroads and Public Utilities	<u>28,576,436</u>	<u>656.02</u>	<u>334,403</u>	<u>7.68</u>	<u>63,250</u>	<u>1.45</u>
Sub-total	79,197,985	1,818.13	4,981,095	114.35	3,435,793	78.87

4. PUBLIC:

	<u>LAND AREA</u>		<u>FLOOR AREA</u>		<u>PARKING AREA</u>	
	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>
Parks	19,666,404	451.48				
Public Buildings	17,731,567	407.10				
Malmstrom A.F.B. <sup>6</sup>	<u>40,553,053</u>	<u>930.97</u>				
Sub-total	77,951,024	1,789.55				

<sup>5</sup> Complete data on Floor Area and Parking Area was not available. It is listed partially on some Zone Sheets.

<sup>6</sup> Exclusive of Commercial Land Area as noted above. This is the part of Malmstrom A.F.B. within the study cordon line only.

5. CHURCHES:

	<u>LAND AREA</u>	
	<u>Sq. Ft.</u>	<u>Acres</u>
	<u>1,788,700</u>	<u>41.06</u>
Sub-total	1,788,700	41.06

6. SEMI-PUBLIC BUILDINGS AND INSTITUTIONS:

	<u>LAND AREA</u>		<u>FLOOR AREA</u>		<u>PARKING AREA</u>	
	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>
Cemeteries	1,800,750	41.34	45,910	1.05	8,000	.18
Lodge Halls	38,458	.88	12,935	.30	10,000	.23
Fraternal Organizations	130,215	2.99	173,199	3.97	6,900	.16
Hospitals	576,400	13.23	532,950	12.23	105,940	2.43
Convalescent Homes	203,440	4.67	63,710	1.46	19,769	.45
Private Schools	3,364,213	77.23	240,012	5.51	151,600	3.48
Country Club	5,577,768	128.05	30,000	.69	80,000	1.84
Boat Club	98,100	2.25	1,800	.04	10,000	.23
Salvation Army	7,500	.17	4,900	.11	2,600	.06
Orphan's Home	580,000	13.32	109,600	2.52	0	0
Union Hall	54,000	1.24	6,824	.16	28,575	.66
Sub-total	12,430,844	285.37	1,221,840	28.04	423,384	9.72

7. VACANT LAND:

<u>NOT ZONED</u>	<u>Sq. Ft.</u>	<u>Acres</u>
Not zoned (area outside City Limits)	363,503,184	8,344.88
Vacant streets (abandoned or undeveloped)	4,248,144	97.52
Vacant alleys (abandoned or undeveloped)	512,050	11.76
Vacant parks (undeveloped)	6,611,355	151.78
Vacant cemetery (undeveloped)	5,893,150	135.29
	380,767,883	8,741.23

ZONING

<u>Area</u>	<u>Use</u>		
A	A	18,525,451	425.28
A	B	431,068	9.90
A	LB	15,750	.36
A	SUB	9,983,163	229.18
B	A	1,412,438	32.43
B	B	816,280	18.74
B	C	15,625	.36
B	GC	188,354	4.32
B	LB	41,000	.94
C	B	195,000	4.48
C	C	1,961,671	45.04
C	GC	30,000	.69
C	LB	777,208	17.84
C	LB-Limited	418,185	9.60
D	GC	2,071,952	47.56
D	LB	703,585	16.15
D	1ST Ind.	11,488,125	263.73
Sub-total		429,842,738	9,867.83

8. RIGHTS-OF-WAY:A R E A  
Acres

Streets	2,550.53
Alleys	166.58
Private Road	<u>2.27</u>
Sub-total	2,719.38

9. MIXED USE:

<u>LAND AREA</u>		<u>FLOOR AREA</u>		<u>PARKING AREA</u>	
<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>

LAND USE CLASSIFICATION  
& NO. OF ESTABLISHMENTS

GB/LI/MDU 4 Estab.	15,000	.35	8,620	.20	9,780	.22
GB/OFF 18 Estab.	71,250	1.64	155,297	3.57	21,719	.50
GB/OFF/MDU 3 Estab.	7,500	.17	24,800	.57		
GB/IB/OFF/SP 13 Estab.	32,280	.74	48,947	1.12	8,623	.20
LI/HOTEL 2 Estab.	3,750	.09	6,125	.14	250	.01
GB/HOTEL 14 Estab.	85,500	1.96	182,048	4.18	8,350	.19
GB/l-FDU 2 Estab.-1 D.U.	7,500	.17	14,500	.33		
GB/IB/OFF/SP/VAC 5 Estab.	15,000	.35	45,000	1.03		
IB/GB 10 Estab.	56,250	1.29	38,162	.88	20,755	.48
GB/IB/MDU 9 Estab.	22,500	.52	36,700	.84	3,940	.09
IB/GB/OFF 6 Estab.	22,500	.52	66,410	1.52	1,090	.03
GB/OFF/VAC 6 Estab.	26,250	.60	81,030	1.86		

9. <u>MIXED USE:</u> (Continued)  LAND USE CLASSIFICATION & NO. OF ESTABLISHMENTS	<u>LAND AREA</u>		<u>FLOOR AREA</u>		<u>PARKING AREA</u>	
	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>
GB/MDU 10 Estab.	31,250	.72	56,335	1.29	4,000	.09
GB/IB/HOTEL 9 Estab.	19,950	.46	59,850	1.37		
GB/IB/OFF/HOTEL 4 Estab.	15,000	.35	54,570	1.25		
DS/OFF 2 Estab.	11,250	.26	78,750	1.81		
GB/IB/OFF/VAC 3 Estab.	15,000	.35	13,750	.32	2,500	.06
GB/LI/OFF 3 Estab.	7,500	.17	6,850	.16		
IB/VAC 1 Estab.	6,375	.14	15,375	.35		
GB/VAC 6 Estab.	58,750	1.35	87,761	2.02	12,814	.30
MDU/VAC 1 Estab.	11,250	.26	17,700	.41	1,050	.02
GB/IB/OFF/SP/HOTEL 5 Estab.	22,500	.52	79,847	1.83		
GB/IB/OFF/HTL/LI/VAC 6 Estab.	15,000	.35	42,190	.97		
GB/SP/HOTEL 3 Estab.	11,250	.26	18,450	.42	1,875	.04
IB/OFF 2 Estab.	3,750	.08	3,950	.09	850	.02
IB/HOTEL/VAC 3 Estab.	7,500	.17	22,500	.52		
GB/OFF/MDU/CHURCH/VAC 3 Estab. - 9 D.U.	7,500	.17	12,500	.29		



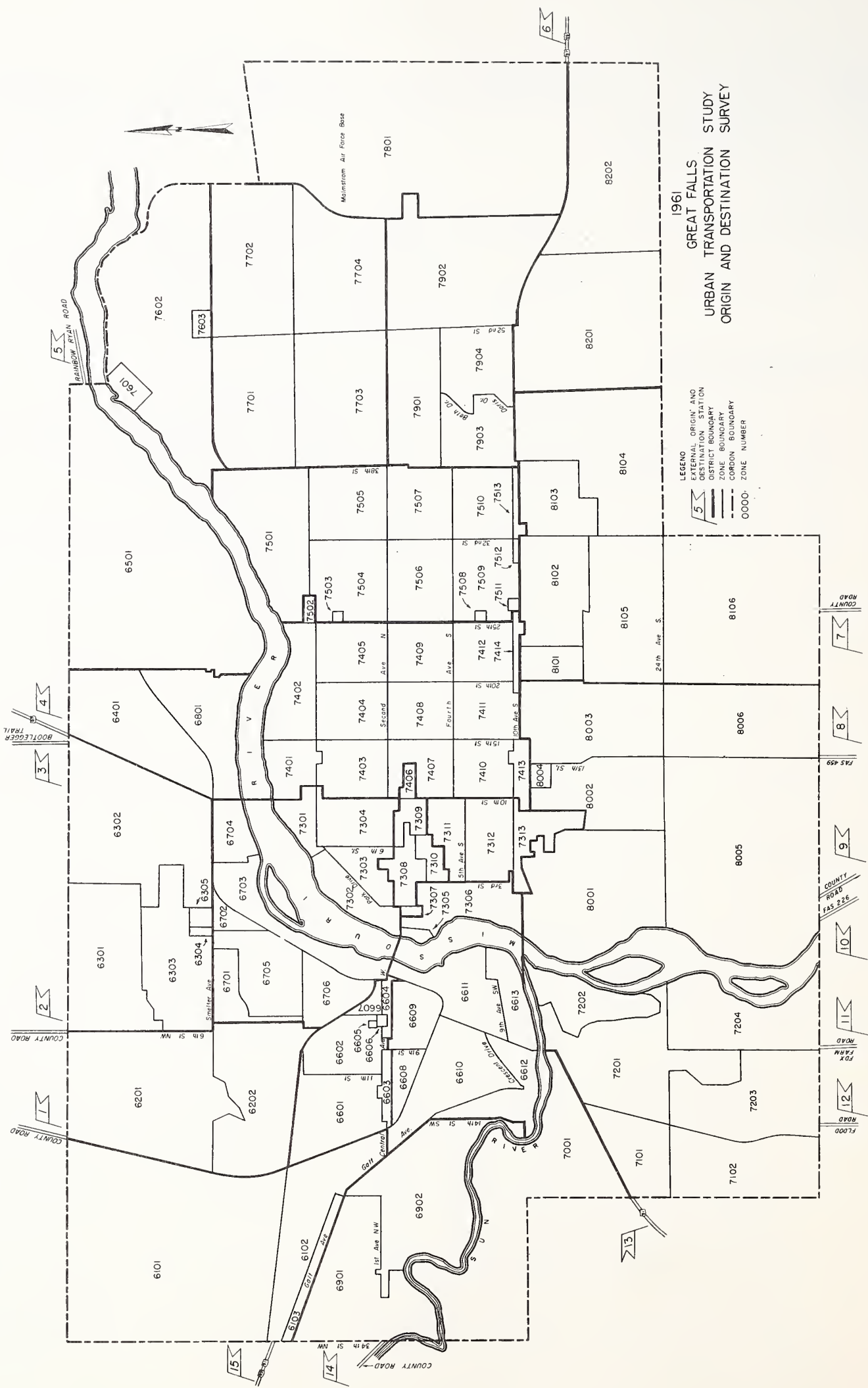
9. MIXED USE: (Continued)

LAND USE CLASSIFICATION & NO. OF ESTABLISHMENTS	<u>LAND AREA</u>		<u>FLOOR AREA</u>		<u>PARKING AREA</u>	
	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>
GB/IB/OFF/MDU 3 Estab.	15,000	.35	21,820	.50	4,090	.09
IB/LI 2 Estab.	3,150	.07	6,300	.14		
IB/HOTEL 5 Estab.	10,000	.23	14,340	.33	3,650	.08
IB/HOTEL/SP 3 Estab.	11,250	.26	23,645	.54	2,250	.05
GB/HOTEL/VAC 3 Estab.	7,500	.17	22,500	.52		
GB/LI 2 Estab.	3,750	.08	5,122	.12	875	.02
IB/GB/VAC 3 Estab.	7,500	.17	8,579	.20	1,100	.03
GB/LI/HOTEL 3 Estab.	7,500	.17	15,980	.37	1,000	.02
HOTEL/SP 2 Estab.	4,500	.10	10,800	.25	900	.02
LB/GB/HOTEL/VAC 4 Estab.	7,500	.17	15,000	.34		
GB/LI/VAC 3 Estab.	8,250	.18	7,375	.17	875	.02
GB/RR/PU 3 Estab.	25,000	.57	25,000	.58		
OFF/MDU 3 Estab.-6 D.U.	3,012	.07	4,562	.10		
IB/LI/SP 3 Estab.	7,500	.17	20,150	.46		
GB/IB/LI/HOTEL 5 Estab.	7,500	.17	22,500	.52		

9. <u>MIXED USE:</u> (Continued) LAND USE CLASSIFICATION & NO. OF ESTABLISHMENTS	<u>LAND AREA</u>		<u>FLOOR AREA</u>		<u>PARKING AREA</u>	
	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>	<u>Sq. Ft.</u>	<u>Acres</u>
MDU/HOTEL						
2 Estab.	<u>7,500</u>	<u>.17</u>	<u>15,000</u>	<u>.34</u>	<u>          </u>	<u>          </u>
Sub-total	745,517	17.11	1,516,690	34.82	112,336	2.58

KEY TO ABBREVIATIONS

- |                            |  |
|----------------------------|--|
| 1. GB - General Business   | 7. 1-FDU - One-family dwelling unit          |
| 2. IB - Intensive Business | 8. MDU - Multiple Dwelling Unit              |
| 3. OFF - Offices and Banks | 9. LI - Light Industry                       |
| 4. DS - Department Stores  | 10. VAC - Vacant                             |
| 5. HTL - Hotels            | 11. LB - Local Business                      |
| 6. SP - Semi-Public        | 12. RR & PU - Railroads and Public Utilities |



1961  
GREAT FALLS  
URBAN TRANSPORTATION STUDY  
ORIGIN AND DESTINATION SURVEY

LEGEND  
EXTERNAL ORIGIN AND DESTINATION  
DISTRICT BOUNDARY  
ZONE BOUNDARY  
CORDON BOUNDARY  
0000- ZONE NUMBER

GREAT FALLS CITY-COUNTY PLANNING BOARD

SUMMARY FIGURES FOR SEPTEMBER 1964 LAND USE INVENTORY - FOR 100 O-D ZONES

A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
6101	1,166.0	1,153.1	0	0	17.0	0	0	0	12.9	0	1,136.1 (All Not Zoned) *Agricultural* I*
6102	304.0	278.9	20.7	7.1	90.4	0	0	0	25.1	0	160.7 (All Not Zoned) *Industrial*
6201	552.0	547.8	11.4	0	0	0	2.1	0	4.2	0	534.3 (Total) *Agricultural* Undev. Sts. & Alleys
6202	384.0	351.2	71.6	2.4	8.3	8.6	4.5	0	32.8	0	255.8 (Total) Not Zoned (In County) *Agricultural* Zoned (In City) Area Use A A B A C C D GC Parks Streets
6301	340.0	313.1	11.3	0	0	4.8	0	0	26.9	0	297.0 (Total) Not Zoned (In County) *Residential* Zoned (In City) Undev. Sts. & Alleys
6302	540.0	463.2	99.1	4.9	10.5	23.6	6.3	0	76.8	0	318.8 (Total) Not Zoned (In County) *Residential* Zoned (In City) Area Use A A C C
											216.8
											16.7 10.5 3.4 .8 6.3 1.3 39.0
											286.0
											11.0
											238.8
											76.2 3.8 80.0



A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
6303	249.9	184.2	161.1	.5	1.1	17.9	.5	0	65.7	0	3.1 (All Zoned A Area, A Use)
6304	6.9	5.7	0	3.4	0	0	0	0	1.2	0	2.3 (All Zoned D Area, GC Use)
6305	12.7	12.3	0	12.3	0	0	0	0	.4	0	0
6401	324.0	304.0	2.5	16.1	16.1	0	0	0	20.0	0	269.3 (All Not Zoned) *Agricultural*
6501	1,100.0	1,081.1	2.6	0	533.9	0	0	0	18.9	0	544.6 (All Not Zoned) *Agricultural*
6601	200.0	137.4	68.9	.9	5.6	11.0	.3	0	62.6	0	50.7 (Total) Not Zoned (In County) *Industrial* Zoned (In City) Area Use A A 8.0 B A 8.6 C LB .2 D GC 1.4 D LB .2 Undev. Park 2.9
6602	126.7	87.0	50.3	.6	3.4	9.2	.3	0	39.7	0	23.2 (Total) Zoned (In City) Area Use A B 3.6 B B 2.5 D LB 6.0 D GC 11.1
6603	24.1	14.1	3.6	4.0	2.6	0	0	0	10.0	0	3.9 (All Zoned D Area, LB Use)
6604	16.7	9.5	2.3	4.8	2.0	0	.3	0	7.2	0	.1 (All Zoned D Area, LB Use)

A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
6605	1.3	1.0	0	1.0	0	0	0	.3	0	0
6606	3.4	2.0	0	1.6	.4	0	0	1.4	0	0
6607	17.7	13.3	2.3	0	6.6	0	0	4.4	0	4.4 (Total) <u>Zoned (In City)</u> <u>Area</u> D 1 St Ind 2.7 D 1 St Ind 1.7
6608	44.8	26.6	18.4	.6	.1	0	0	18.2	0	7.5 (Total) <u>Zoned (In City)</u> <u>Area</u> C 4.3 D 1 St Ind 3.2
6609	90.6	52.9	44.5	.8	.6	4.6	.4	37.7	0	1.7 (Total) <u>Zoned (In City)</u> <u>Area</u> B .4 D 1 St Ind 1.2 D LB .1
6610	230.3	224.9	0	0	99.6	0	0	5.4	0	125.3 (All Zoned D Area, 1 St Ind Use)
6611	172.0	166.2	25.5	.5	140.2	0	0	5.8	0	0
6612	119.1	107.1	87.8	.2	9.5	0	0	12.0	0	9.6 (Total) <u>Not Zoned (In County)</u> <u>*Residential*</u> <u>Zoned (In City)</u> <u>Area</u> A 3.5 B 2.4 Sub 3.7
6613	85.8	77.4	68.3	0	0	1.2	.5	8.4	0	7.4 (All Zoned A Area, Sub Use)

# A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
6701	61.9	51.9	33.0	0	.3	14.0	0	10.0	0	4.6 (Total) Zoned (In City) <u>Area</u> A Vacant Streets
6702	28.4	23.7	0	5.4	14.0	0	0	4.7	0	4.3 (All Zoned B Area, GC Use)
6703	152.0	142.1	3.0	4.3	59.5	0	0	9.9	0	75.3 (Total) Not Zoned (In County) *Industrial* Zoned (In City) <u>Area</u> D 1 St Ind Vacant Streets Vacant Parks
6704	72.0	68.6	0	0	30.9	0	0	3.4	0	37.7 (All Not Zoned) *Industrial*
6705	172.0	167.9	0	.1	35.6	35.0	0	4.1	0	97.2 (Total) Not Zoned (In County) *Residential* Zoned (In City) Vacant Streets
6706	109.5	106.3	0	0	4.3	102.0	0	3.2	0	0
6801	212.0	172.7	46.1	2.7	16.9	1.1	4.9	39.3	0	101.0 (Total) Not Zoned (In County) *Residential* Zoned (In City) Vacant Streets Vacant Alleys

A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND		
6901	369.5	291.6	146.5	1.2	.8	5.3	0	.5	77.9	0	137.3 (Total) Not Zoned (In County) *Residential* Zoned (In City) Vacant Streets	132.1 5.2
6902	409.8	314.2	188.1	17.6	5.1	2.0	.7	0	95.6	0	100.7 (Total) Not Zoned (In County) *Residential* Zoned (In City) Area Use A Sub Undev. Parks Undev. Streets	16.6 80.6 2.5 1.0
7001	688.0	590.4	43.5	4.7	13.2	0	0	0	97.6	0	529.0 (Total) Not Zoned (In County) *Agricultural* Zoned (In City) Area Use A A B A Sub C LB Undev. Parks Undev. Streets Undev. Alleys	398.9 18.3 6.3 71.9 8.4 7.9 14.1 3.2
7101	152.0	121.8	2.1	0	6.9	1.9	0	0	30.2	0	110.9 (Total) Not Zoned (In County) *Residential* Zoned (In City) Undev. Streets Undev. Alleys	100.8 8.7 1.4



# A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
7201	372.6	309.6	88.4	2.0	7.5	20.4	0	0	63.0	0	191.3 (Total) Not Zoned (In County) *Residential* Zoned (In City) Area Use A 44.8 C 1.8 C 11.8 LB 21.6 Undev. Streets 15.8 Undev. Parks
7202	184.8	179.1	0	0	0	48.8	0	130.3	5.7	0	
7301	58.8	49.1	1.2	1.2	36.8	9.9	0	0	9.7	0	
7302	92.4	83.6	2.6	.8	17.2	63.0	0	0	8.8	0	
7303	70.5	41.9	34.4	4.1	.6	1.7	.3	.4	28.6	0	.4 (All Zoned C Area, C Use)
7304	112.3	68.6	58.4	2.4	1.4	1.3	3.1	1.8	43.7	0	.2 (All Zoned C Area, B Use)
7305	10.6	9.0	0	0	0	9.0	0	0	1.6	0	0
7306	148.0	124.2	2.6	9.8	101.7	7.5	0	0	23.8	2.5	.1 (All Zoned D Area, 1 St Ind Use)
7307	6.7	5.0	0	0	0	5.0	0	0	1.7	0	0
7308	61.9	37.6	.9	17.0	2.4	3.8	0	.2	24.3	13.3	0
7309	34.0	20.1	3.1	12.2	1.7	1.9	0	.5	13.9	0	.7 (All Zoned C Area, GC Use)
7310	29.6	18.1	1.5	8.3	6.3	.5	0	.5	11.5	1.0	0
7311	73.3	44.2	38.5	3.1	2.1	0	0	0	29.1	0	.5 (All Zoned C Area, C Use)

A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
7312	120.8	73.2	68.4	1.8	.7	0	.3	0	47.6	0	2.0 (All Zoned A Area, A Use)
7313	79.3	60.9	21.2	10.3	10.8	0	0	0	18.4	0	18.6 (Total) Not Zoned (In County) *Residential* Zoned (In City) <u>Area</u> Use D GC Undev. Parks 16.1 .8
7401	90.4	70.0	3.7	.1	47.0	0	0	0	20.4	0	19.2 (All Zoned D Area, 1 St Ind Use)
7402	138.8	124.4	5.0	1.3	62.0	.3	0	0	14.4	0	55.8 (All Zoned D Area, 1 St Ind Use)
7403	124.2	75.8	68.3	1.6	1.4	.9	.3	2.1	48.4	0	1.2 (All Zoned A Area, A Use)
7404	128.2	77.9	69.7	.7	0	3.4	.2	2.9	50.3	0	1.0 (All Zoned A Area, A Use)
7405	128.4	79.2	65.6	.7	.3	8.3	1.9	0	49.2	0	2.4 (Total) Zoned (In City) <u>Area</u> Use A C 1.4 1.0
7406	13.9	8.2	1.1	4.2	1.0	.2	.7	0	5.7	0	1.0 (All Zoned D Area, GC Use)
7407	104.5	63.8	45.8	3.6	.3	10.1	2.8	0	40.7	0	1.2 (All Zoned D Area, GC Use)
7408	119.6	78.3	56.4	.6	0	19.4	.5	0	41.3	0	1.4 (All Zoned A Area, A Use)
7409	118.6	75.4	61.3	.6	.1	0	.5	12.9	43.2	0	0

# A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
7410	107.5	67.1	56.7	.6	0	7.5	1.3	0	40.4	0	1.0 (All Zoned A Area, A Use)
7411	116.2	80.3	65.5	1.2	0	12.2	0	0	35.9	0	1.4 (All Zoned A Area, A Use)
7412	105.9	66.5	62.5	0	.2	0	0	0	39.4	0	3.8 (All Zoned A Area, A Use)
7413	34.3	23.8	7.9	12.3	.9	0	0	0	10.5	0	2.7 (Total) Zoned (In City) Area Use A LB B LB C LB
7414	18.3	11.3	1.0	8.8	.1	0	0	0	7.0	.3	1.1 (Total) Zoned (In City) Area Use A LB B LB C LB
7501	322.5	299.8	0	0	40.7	115.2	0	0	22.7	0	143.9 (Total) Zoned (In City) Area Use A LB B LB C LB
7502	8.0	6.9	0	0	6.9	0	0	0	1.1	0	Undev. Parks 66.9 77.0
7503	4.0	2.6	0	2.6	0	0	0	0	1.4	0	
7504	185.8	116.0	100.0	.2	3.4	5.1	.2	0	69.8	0	7.1 (All Zoned A Area, A Use)

A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND	
7505	166.9	103.3	93.7	.9	0	3.7	.2	0	63.6	0	4.8 (Total) Zoned (In City) Area Use A C D GC
7506	166.6	101.2	97.3	.3	0	0	1.0	0	65.4	0	2.6 (All Zoned A Area, A Use)
7507	144.5	93.2	74.1	1.5	.2	2.7	.2	13.3	51.3	0	1.2 (All Zoned A Area, A Use)
7508	4.0	2.4	0	1.5	0	0	0	0	1.6	0	.9 (All Zoned C Area, LB Use)
7509	152.0	98.4	73.6	2.8	0	18.3	2.1	0	53.6	0	1.6 (Total) Zoned (In City) Area Use A C LB Limited
7510	130.4	88.8	77.3	.4	0	7.0	0	0	41.6	0	4.1 (All Zoned A Area, A Use)
7511	4.0	2.6	0	2.6	0	0	0	0	1.4	0	0
7512	4.1	2.7	0	1.4	.6	0	0	0	1.4	0	.7 (All Zoned C Area, LB Use)
7513	15.2	8.5	0	2.4	0	0	0	0	6.7	0	6.1 (Total) Zoned (In City) Area Use A D C GC LB Undev. Parks
											4.1 .3 1.2 .5

4.1  
.3  
1.2  
.5

111

.4  
1.2



A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
7601	29.7	27.3	0	0	0	11.0	0	0	2.4	0	16.3 (All Not Zoned) *Public*
7602	715.0	680.3	1.0	.5	21.3	0	0	0	34.7	0	657.5 (All Not Zoned) *Industrial* *Agricultural*
7603	15.8	15.1	.5	0	11.8	0	0	0	.7	0	2.8 (All Not Zoned) *Industrial*
7701	337.0	315.1	0	0	61.7	0	0	0	21.9	0	253.4 (All Not Zoned) *Industrial*
7702	391.6	374.5	0	0	41.4	0	0	0	17.1	0	333.1 (All Not Zoned) *Industrial* *Agricultural*
7703	386.2	338.3	66.2	2.3	18.3	12.8	.6	0	47.9	0	238.1 (Total) Not Zoned (In County) *Residential* Zoned (In City) Area Use A A C C D LB 19.0 6.7 1.0
7704	351.8	336.4	194.6	24.2	0	17.4	0	0	15.4	0	100.2 (All Not Zoned) *Residential*
7801	940.0	940.0				940.0	(Specific Area Categories for Malmstrom AFB not tabulated)				
7901	232.7	205.2	58.3	13.5	0	52.0	1.4	0	27.5	0	80.0 (Total) Not Zoned (In County) *Residential* Zoned (In City) Area Use A A 13.6

A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
7902	511.5	447.5	93.0	7.5	0	11.0	0	0	64.0	0	336.0 (Total) Not Zoned (In County) *Agricultural* Zoned (In City) <u>Area Use</u> A B C Undev. Streets
											303.1
											14.5
											7.4
											4.1
											6.9
7903	152.8	109.6	91.9	1.4	.3	2.2	.7	.2	43.2	0	12.9 (Total) Zoned (In City) <u>Area Use</u> A D GC Undev. Streets
											7.7
											5.0
											.2
7904	162.2	117.1	90.4	.2	1.4	15.4	0	0	45.1	0	9.7 (Total) Zoned (In City) <u>Area Use</u> A D GC
											6.5
											3.2
8001	483.8	422.0	106.7	8.4	40.4	28.5	0	1.2	61.8	0	236.8 (Total) Not Zoned (In County) *Residential* Zoned (In City) <u>Area Use</u> A B D 1 St Ind Undev. Parks
											129.7
											71.4
											2.7
											24.4
											8.6
8002	245.6	188.2	31.3	.3	0	65.5	0	7.9	57.4	0	83.2 (Total) Not Zoned (In County) *Residential* Zoned (In City) <u>Area Use</u> A
											69.9
											13.3

# A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
8003	336.6	214.4	116.3	3.0	2.7	13.2	.2	0	122.2	0	79.0 (Total) Not Zoned (In County) *Residential* Zoned (In City) <u>Area</u> <u>Use</u> A    A    30.4 B    A    .2 C    B    2.5 C    C    1.5 C    LB    .5 D    LB    1.7 D    GC    .3 Undev. Streets    3.6 Undev. Alleys    3.8
8004	17.8	15.6	0	15.6	0	0	0	0	2.2	0	0
8101	69.7	63.9	0	0	0	0	0	63.9	5.8	0	0
8102	225.2	201.0	8.9	8.6	3.1	0	0	13.0	24.2	0	167.4 (Total) Not Zoned (In County) *Residential* Zoned (In City) <u>Area</u> <u>Use</u> A    A    8.2 C    C    9.7 D    GC    1.7 Undev. Streets    7.3 Undev. Alleys    1.1
8103	156.4	105.8	43.6	3.1	0	0	1.7	0	50.6	0	57.4 (Total) Zoned (In City) <u>Area</u> <u>Use</u> A    A    19.8 C    C    10.8 D    LB    3.2 Undev. Parks    22.4 Undev. Streets    1.0 Undev. Alleys    .2

A R E A I N A C R E S

O-D ZONE	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND	
8104	482.3	471.0	.8	1.6	31.9	0	0	0	11.3	0	436.7 (Total) <u>Not Zoned (In County)</u> *Agricultural* <u>Zoned (In City)</u> <u>Area Use</u> A A B A	409.0
8105	346.4	338.9	0	0	0	0	0	33.5	7.5	0	305.4 (Total) <u>Not Zoned (In County)</u> *Residential* Undev. Cemetery	170.1 135.3
8201	620.0	610.2	0	38.3	91.8	0	0	0	9.8	0	480.1 (All Not Zoned) *Agricultural*	
8202	560.0	546.7	0	0	0	0	0	0	13.3	0	546.7 (All Not Zoned) *Agricultural*	
TOTAL OF 100 ZONES	20,421.6	17,701.9	3,525.7	352.1	1,815.8	1,798.3	41.0	285.4	2,719.7	17.1	9,866.5	

I\* Indicates Probable Future County Zoning\*



GREAT FALLS CITY-COUNTY PLANNING BOARD

SUMMARY FIGURES FOR SEPTEMBER 1964 LAND USE INVENTORY - FOR 15 NEIGHBORHOOD UNITS

A R E A I N A C R E S

NEIGHBORHOOD UNIT	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
1	1,466.6	1,364.3	260.8	26.6	121.3	30.2	.6	0	102.3	0	924.8 (Total) Not Zoned (In County) *Industrial* I* 403.4 *Agricultural* 156.4 *Residential* 338.3 898.1
(O-D Zones 7701, 7702, 7703, 7704)											
2	1,059.2	879.4	333.5	22.6	1.6	80.7	2.2	.2	179.8	0	438.6 (Total) Not Zoned (In County) *Residential* 66.4 *Agricultural* 303.1 369.5
(O-D Zones 7901, 7902, 7903, 7904)											
											116
											19.0 6.7 1.0
											42.2 7.3 4.1 8.3 7.2

A R E A I N A C R E S

NEIGHBORHOOD UNIT	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
3	1,279.9	1,180.6	53.4	13.3	35.0	0	1.7	110.3	99.3	0	966.9 (Total) Not Zoned (In County) *Residential* *Agricultural* 309.6 409.0 718.6
(O-D Zones 8101, 8102, 8103, 8104, 8105)											Zoned (In City) Area Use A A 42.5 B A 13.3 C C 20.4 D GC 1.7 D LB 3.1 Undev. Parks 22.4 Undev. Streets 8.3 Undev. Alleys 1.3 Undev. Cemetery 135.3
4	1,307.9	926.4	516.0	16.6	51.9	152.0	3.6	13.3	381.5	0	173.0 (Total) Not Zoned (In County) None Zoned (In City) Area Use A A 22.6 A Sub 66.9 C C 1.4 C LB 2.9 C LB-Limited 1.2 D GC .6 Undev. Parks 77.4
(O-D Zones 7501 thru 7513, incl)											
5	1,314.4	878.3	562.6	24.1	112.4	62.4	8.1	17.8	436.1	.4	90.5 (Total) Not Zoned (In County) None Zoned (In City) Area Use A A 11.2 C C 1.0 A LB .2
(O-D Zones 7401 thru 7412, incl, & 7414)											

# A R E A I N A C R E S

NEIGHBORHOOD UNIT	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
5 (Cont.)											
6	1,197.6	925.0	283.5	49.9	54.8	107.2	.2	9.1	272.6	0	<div> <div>Area</div> <div>Use (Cont.)</div> <div> <div>B</div> <div>LB</div> <div>C</div> <div>LB</div> <div>D</div> <div>GC</div> <div>D</div> <div>1 St Ind</div> </div> </div>
(O-D Zones 7313, 7413, 8001, 8002, 8003, 8004)											<div> <div>420.3 (Total)</div> <div>Not Zoned (In County)</div> <div>*Residential*</div> <div>Zoned (In City)</div> <div>Area</div> <div>Use</div> <div> <div>A</div> <div>A</div> <div>B</div> <div>A</div> <div>B</div> <div>B</div> <div>C</div> <div>C</div> <div>A</div> <div>LB</div> <div>B</div> <div>LB</div> <div>C</div> <div>LB</div> <div>D</div> <div>LB</div> <div>D</div> <div>GC</div> <div>D</div> <div>1 St Ind</div> <div>Undev. Parks</div> <div>Undev. Streets</div> <div>Undev. Alleys</div> </div> </div>
7	818.8	574.4	211.5	60.6	170.8	103.6	3.8	3.5	244.4	16.7	<div> <div>3.9 (Total)</div> <div>Not Zoned (In County)</div> <div>None</div> <div>Zoned (In City)</div> <div>Area</div> <div>Use</div> <div> <div>A</div> <div>A</div> <div>C</div> <div>B</div> <div>C</div> <div>C</div> <div>C</div> <div>GC</div> <div>D</div> <div>1 St Ind</div> </div> </div>
(O-D Zones 7301, thru 7312, incl.)											<div> <div>2.0</div> <div>.2</div> <div>.8</div> <div>.7</div> <div>.2</div> </div>

# A R E A I N A C R E S

NEIGHBORHOOD UNIT	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
8	557.4+	488.7+	88.4	2.0	7.5	69.2	0	130.3	68.7	0	191.3 (Total) Not Zoned (In County) *Residential* Zoned (In City) Area Use A 44.8 C 1.8 C LB 11.8 Undev. Parks 15.8 Undev. Streets 21.6
(O-D Zones 7201, 7202, and acres not in zones)											95.5
9	688.0	590.4	43.5	4.7	13.2	0	0	0	97.6	0	529.0 (Total) Not Zoned (In County) *Agricultural* Zoned (In City) Area Use A 18.3 A B 6.3 A Sub 71.9 C LB 8.4 Undev. Parks 7.9 Undev. Streets 14.1 Undev. Alleys 3.2
(O-D Zone 7001)											398.9
10	1,132.6	919.3	371.9	14.9	270.7	25.9	1.8	.3	213.3	0	233.8 (Total) Not Zoned (In County) *Industrial* *Residential* Zoned (In City) Area Use A 8.0 A B 3.6 A Sub 9.7 B A 8.6 B B 6.2 B C .4 C B 4.3 C LB .1 D GC 15.1 D 1 St Ind 131.6
(O-D Zones 6601 thru 6613 incl.)											29.5 3.5 33.0



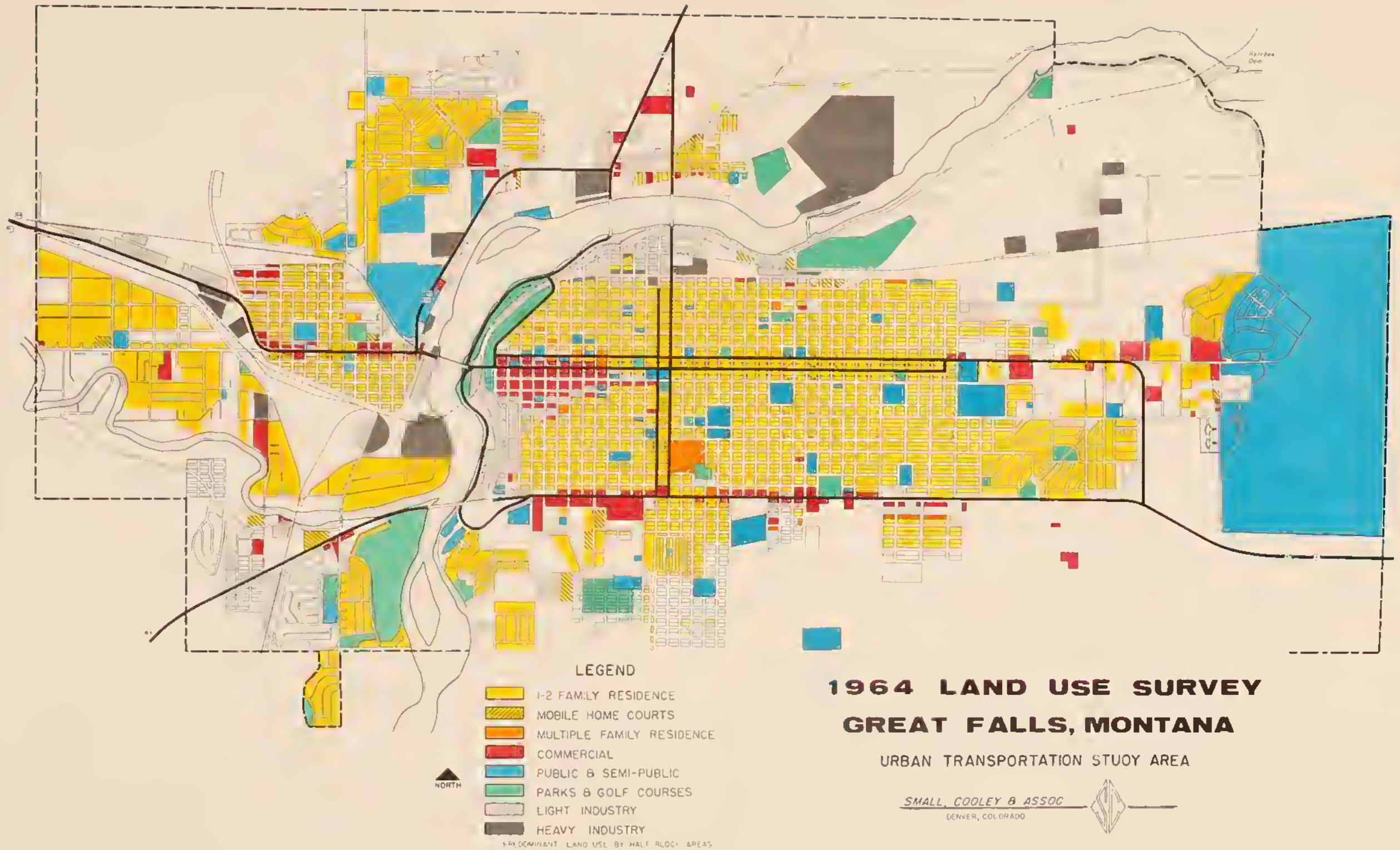
A R E A I N A C R E S

NEIGHBORHOOD UNIT	TOTAL	NET	RESIDENTIAL	COMMERCIAL	INDUSTRIAL	PUBLIC	CHURCHES	SEMI-PUBLIC	PUBLIC R.O.W.	MIXED	VACANT LAND
10 (Cont.)											<div>Area Use (Cont.)</div> <div>D LB</div> <div>Undev. Parks</div> <div>10.3</div> <div>2.9</div>
11	779.3	605.8	334.6	18.8	5.8	7.3	.7	.5	173.5	0	<div>238.1 (Total)</div> <div>Not Zoned (In County)</div> <div>*Residential*</div> <div>Zoned (In City)</div> <div>Area Use</div> <div>A Sub</div> <div>Undev. Parks</div> <div>Undev. Streets</div> <div>148.8</div>
(O-D Zones 6901 & 6902)											<div>80.6</div> <div>2.5</div> <div>6.2</div>
12	936.0	899.0	83.0	2.4	8.3	8.6	6.6	0	37.0	0	<div>790.1 (Total)</div> <div>Not Zoned (In County)</div> <div>*Agricultural*</div> <div>Zoned (In City)</div> <div>Area Use</div> <div>A A</div> <div>B A</div> <div>C C</div> <div>D GC</div> <div>Undev. Streets</div> <div>Undev. Parks</div> <div>Undev. Alleys</div> <div>737.8</div> <div>16.6</div> <div>10.6</div> <div>3.4</div> <div>.8</div> <div>13.0</div> <div>6.3</div> <div>1.6</div>
(O-D Zones 6201 & 6202)											<div>120</div>
13	595.8	560.5	36.0	9.7	144.7	151.0	0	0	35.3	0	<div>219.1 (Total)</div> <div>Not Zoned (In County)</div> <div>*Industrial*</div> <div>*Residential*</div> <div>Zoned (In City)</div> <div>Area Use</div> <div>A A</div> <div>B GC</div> <div>D 1 St Ind</div> <div>Undev. Parks</div> <div>Undev. Streets</div> <div>78.3</div> <div>92.6</div> <div>170.9</div>
(O-D Zones 6701 thru 6706 incl.)											<div>3.7</div> <div>4.3</div> <div>32.6</div> <div>.3</div> <div>7.3</div>

## NEIGHBORHOOD

I\* Indicates Probable Future County Zoning\*









II

LAND USE PROJECTIONS

to 1969, 1974, 1979 & 1981

Land Use Projections:

Land use projections were made for transportation planning purposes, and also for immediate zoning recommendations in the County area, presently unzoned, surrounding the City. Information gained in the personal and letter-form interviews was utilized along with the personal knowledge of growth trends and patterns of the City-County Planning Board staff. Plats, both pending and filed, were reviewed along with records of the Building Inspector's Department as to permits for new construction. The County Assessor's records were also reviewed. Maps and overlays were prepared of the following items:

1. Dot maps showing permits for new dwelling units, annually, 1950-1965.
2. Land Use, by category, from the 1964 survey and inventory.
3. County zoning, as it existed prior to the adverse Court decision.
4. Flooded areas from the two recent floods.
5. Recommended "clear zone" areas near airports.
6. Existing and proposed major roadways.
7. Existing and proposed community facilities, such as schools, parks, swimming pools, fire stations, libraries, etc.
8. Existing and proposed water mains, and proposed "high-level" service areas.
9. Existing and proposed sewage mains, including designation of areas not possible to serve from present plant.
10. Existing and proposed storm sewers, including designation of areas where growth will be hindered because of inadequate storm drainage.
11. Existing and proposed plats of presently undeveloped areas.
12. Proposed land use, by type, was then mapped, showing the first five-year growth stage, and the remainder to 1981.

In addition to the work of the City-County Planning Board staff, many other department heads and individuals participated in this work. The City Engineer was particularly helpful. Also a great deal of information was utilized from the various reports of the Urban Transportation Survey of the Planning Survey Division, Montana State Highway Commission.

All vacant land within the study area was reviewed on maps and by field trips as to its topographic and drainage characteristics, the availability of roads and rail access, the availability of water and sewerage facilities and power, the existing or proposed zoning, adjoining land use, and general growth trends in the area. Development of these vacant areas was then projected on the Land Use Projection Map.

Population was estimated for 1964, the date of the Land Use Survey, for O-D Zones and Neighborhood Units, by the following process:

1. 1960 population was totaled from the 1960 Census block statistics for each O-D Zone and Neighborhood Unit.
2. From the Building Inspector's records, a 1964 dwelling unit count was computed.
3. By utilizing family-size information for each area, 1964 population estimates were prepared.

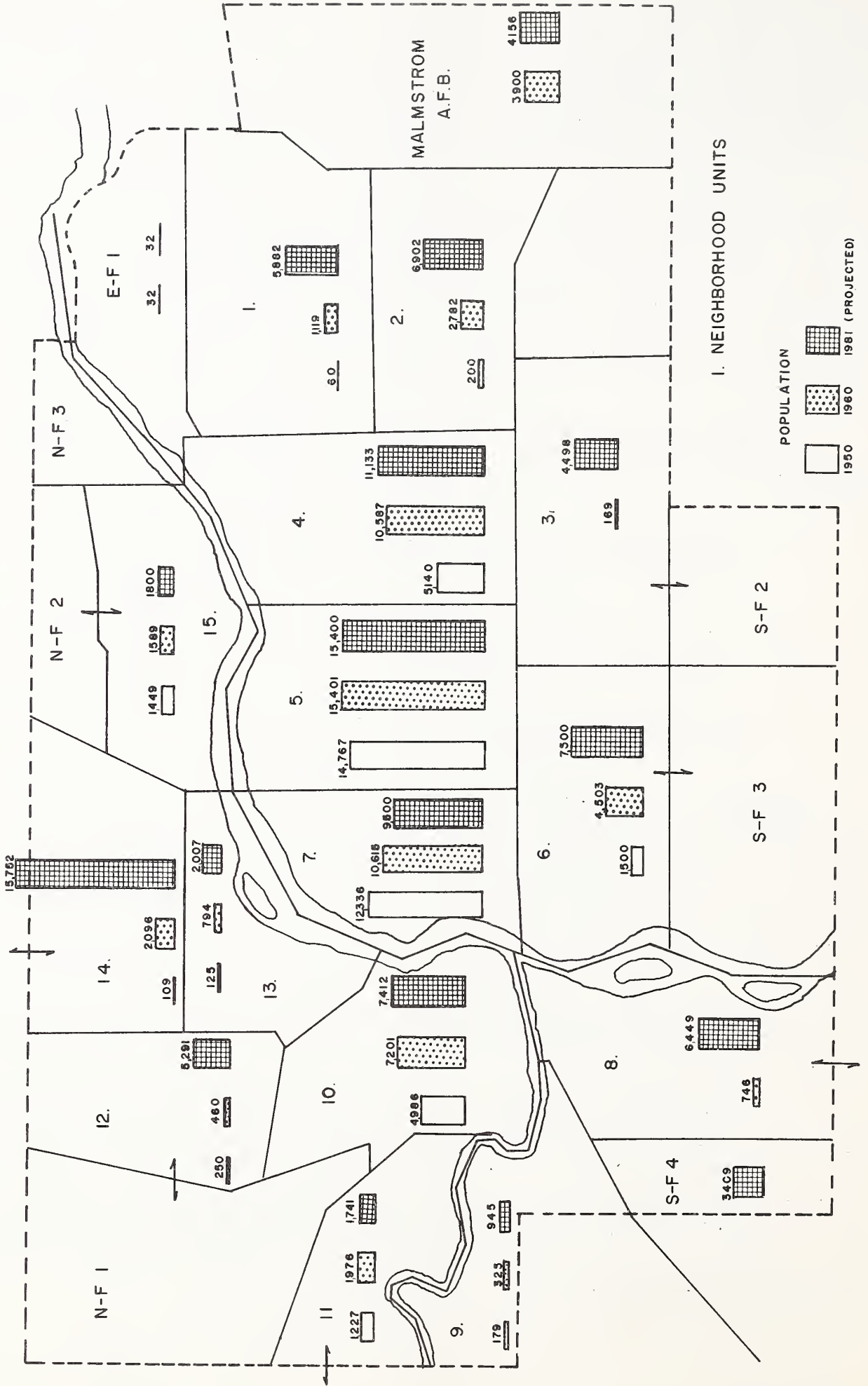
From the economic study, total amounts of land use, by type, were forecast to 1981. Gross acreages, which include local streets, were utilized in these computations. For new single-family residential development, an average of 3.5 dwelling units per gross acre, and 3.2 persons per family was assumed. New business development was related to projected consumer buying power, and new industrial development was related to projected employment in these uses. Trends of increased space usage because of new technology, new plant design, parking, etc., were utilized in projecting the acres of new business and industrial growth.

The following tables show residential land use projections by five-year periods from 1964 to 1981. The figures are summarized for each O-D Zone and each Neighborhood Unit, along with totals for the period. While the total population projection was 110,000, these tables total to 105,680 because Malmstrom Air Force Base and other minor areas are outside of the designated neighborhood units.



# GREAT FALLS

## URBAN TRANSPORTATION STUDY AREA



FACTORS AFFECTING DEVELOPMENT IN EACH NEIGHBORHOOD UNITUNIT #1

1950 Population	60	Area	1,466.6 acres
1960 Population	1,119		
1964 Population	2,084	O-D Zones	7701-7704
1969 Population	3,194		
1976 Population	4,314		
1979 Population	5,434		
1981 Population	5,882		

The residential development in this unit consists of moderately priced houses and the Boeing Trailer Court (Minuteman employees). This is probably a temporary use. A number of industrial uses are located in this unit, such as the Milwaukee Railroad Yards, Weissman Scrap Yards, Birch Construction, Conoco Bulk Plant, and Great Falls Meat Packing Company. There are large areas available for industrial use. There are new housing units of the relocatable type on Malmstrom Air Force Base property, and approximately 80 families have recently moved onto the Base. The proximity of the Air Force Base does not appear to deter new development. It would appear desirable to relocate the one contractor's yard at 38th Street and 7th Avenue North so that the area south of the railroad tracks could be kept in residential use. One large landowner owns much of the land north and west of the Air Force Base that is presently undeveloped, and he wishes to keep it in residential use. The area north of the tracks is probably the best potential industrial area in the City. It is relatively flat, has excellent utility service, excellent roadway and rail access. For residential development in this unit, the same factors, excluding railroad access, will assist in drawing new development. In addition, shopping facilities and schools are immediately available. Proximity to the Air Force Base will also bring some new development.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	260.8
Commercial	26.6
Industrial	121.3
Public & Semi-Public	30.8
Public R.O.W.	102.3
Vacant Land	924.8

Vacant: 924.8 (Total)

Not Zoned (In County)

Industrial	-	403.4
Agricultural	-	156.4
Residential	-	<u>338.3</u>
		898.1

Zoned (In City)

<u>Area</u>	<u>Use</u>	
A	A	19.0
C	C	6.7
D	LB	1.0

UNIT #2

1950 Population	200	Area	1,059.2 acres
1960 Population	2,782		
1964 Population	5,640	O-D Zones	7901-7904
1969 Population	6,447		
1974 Population	6,636		
1979 Population	6,825		
1981 Population	6,902		

The developed portion of this unit consists of frame and brick houses with open and sub-standard uses in the County. A large Junior High School is located in this unit, and the unit lies adjacent to Malmstrom Air Force Base. A large 80-acre shopping center, known as "Harvest Hills," is planned within this unit between 3rd and 9th Avenues South, and between 57th Street and 60th Street. According to announced plans, this shopping center will contain the relocated Buttrey Department Store, a Penney's Store, and a Buttrey's Supermarket, among other uses. This proposed shopping center is shown on the projected land use map, and will be a major traffic influence when it is built. Construction has not yet begun.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	333.5
Commercial	22.6
Industrial	1.6
Public & Semi-Public	83.1
Public R.O.W.	179.8
Vacant Land	438.6

Vacant: 438.6 (Total)

<u>Not Zoned (In County)</u>		<u>Zoned (In City)</u>	
		<u>Area</u>	<u>Use</u>
Residential	- 66.4	A	A 42.2
Agricultural	- <u>303.1</u>	B	B 7.3
	369.5	C	C 4.1
		D	GC 8.3
		Undev. Streets	7.2



UNIT #3

1950 Population	0	Area	1,279.9 acres
1960 Population	169		
1964 Population	1,054	O-D Zones	8101-8105
1969 Population	2,011		
1974 Population	3,048		
1979 Population	4,085		
1981 Population	4,498		

Development in this unit is primarily in the Charles Russell Addition with homes in the medium-to-high price level on large sites. A nursing home is also built in this unit. The streets are not paved as yet. A new automobile dealer has recently located at the northeast corner of this unit, on 10th Avenue South. Some business exists along 10th Avenue South, with a few apartments between the business area and the single-family homes. The area served by sanitary sewers will continue to develop moderately, but the area south of the Ridge line can only develop when a major new sewage treatment plant is built, or a pumping station provided. A storm sewer is also needed for a portion of the area. The approach zone to Malmstrom Air Force Base becomes an inhibiting factor at the southern edge of this unit, and the cemetery may also restrict adjacent development. A slaughterhouse is in operation south of the unit. Approximately 150-160 acres are immediately available for residential development to the north of the Ridge line.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	53.4
Commercial	13.3
Industrial	35.0
Public & Semi-Public	112.0
Public R.O.W.	99.3
Vacant Land	966.9

Vacant: 966.9 (Total)

<u>Not Zoned (In County)</u>	
Residential -	309.6
Agricultural -	<u>409.0</u>
	718.6

<u>Zoned (In City)</u>		
<u>Area</u>	<u>Use</u>	
A	A	42.5
B	A	13.3
C	C	20.4
D	GC	1.7
D	LB	3.1
Undev. Parks		22.4
Undev. Streets		8.3
Undev. Alleys		1.3
Undev. Cemetery		135.3

UNIT #4

1950 Population	5,140	Area	1,307.9 acres
1960 Population	10,587		
1961 Population	10,559	O-D Zones	7501-7513
1964 Population	11,046		
1969 Population	11,133		
1974 Population	11,133		
1979 Population	11,133		
1981 Population	11,133		

This unit consists primarily of a substantial residential development of well-kept older homes. Only a few scattered vacant lots exist south of 9th Avenue North. The only undeveloped area consists of the Municipal Golf Course, the Veteran's Memorial Park, the American Legion Baseball Park, and some area immediately south of the river. The topography is severe on this land, limiting the potential industrial use. A few more sites are expected to develop in homes, and no apartment re-use is contemplated.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	516.0
Commercial	16.6
Industrial	51.9
Public & Semi-Public	168.9
Public R.O.W.	381.5
Vacant Land	173.0

Vacant: 173.0 (Total)

<u>Not Zoned (In County)</u>	<u>Zoned (In City)</u>	
None	<u>Area</u>	<u>Use</u>
	A	A 22.6
	A	Sub 66.9
	C	C 1.4
	C	LB 2.9
	C	LB-Lim. 1.2
	D	GC .6
	Undev. Parks	77.4

UNIT #5

1950 Population	14,767	Area	1,314.4 acres
1960 Population	15,401		
1964 Population	15,580	O-D Zones	7401-7412
1969 Population	15,530		
1974 Population	15,480		
1979 Population	15,430		
1981 Population	15,400		

This unit is quite similar to Unit #4, except it is older. Some good industrial potential exists north of the railroad tracks. Infilling of new residences will be very slow because of limited available sites. A small amount of apartment building will take place in this unit. The unit contains the "Parkdale" public housing area, which is well kept.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	562.6
Commercial	24.1
Industrial	112.4
Public & Semi-Public	88.3
Public R.O.W.	436.1
Vacant Land	90.5

Vacant: 90.5 (Total)

Not Zoned (In County)  
None

Zoned (In City)

<u>Area</u>	<u>Use</u>	
A	A	11.2
C	C	1.0
A	LB	.2
B	LB	.6
C	LB	.3
D	GC	2.2
D	1 St Ind.	75.0

UNIT #6

1950 Population	1,500	Area	1,197.6 acres
1960 Population	4,030		
1961 Population	5,658	O-D Zones	7313, 7413
1964 Population	5,050		8001-8004
1969 Population	5,703		
1974 Population	6,362		
1979 Population	7,021		
1981 Population	7,500		

Development in this area is very mixed as to usage and quality. Some very sub-standard development exists in the south and southeastern portion of the unit. Fine new homes are being built on the west side of this unit. Some trailer housing exists in the County. The County Hospital is in this unit, as is a new Eagle Lodge, and a City-County park site. Holiday Village, the biggest existing shopping center in the area, is on 10th Avenue South. Major expansions are planned for this center. The sewer drainage break cuts this area also, and future development in the southern part of the unit will depend upon future sewerage services to the south or a pumping station. More business development can be anticipated along 10th Avenue South.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	283.5
Commercial	49.9
Industrial	54.8
Public & Semi-Public	116.5
Public R.O.W.	272.6
Vacant Land	420.3

Vacant: 420.3 (Total)

Not Zoned (In County)  
 Residential - 235.8

Zoned (In City)

<u>Area</u>	<u>Use</u>	
A	A	115.1
B	A	.2
B	B	5.2
C	C	1.5
A	LB	.2
B	LB	.3
C	LB	2.7
D	LB	1.7
D	GC	16.4
D	1 St Ind.	24.4
Undev. Parks		9.4
Undev. Streets		3.6
Undev. Alleys		3.8



UNIT #7

1950 Population	12,336	Area	818.8 acres
1960 Population	10,615		
1964 Population	10,731	O-D Zones	7301-7312
1969 Population	10,372		
1974 Population	10,011		
1979 Population	9,650		
1981 Population	9,500		

This unit contains the oldest housing in the area and the Central Business District of Great Falls. Some residential blight is apparent in this unit, particularly on the south side. There is almost no vacant ground, but some new apartments can be expected on redeveloped land. Expansion and the economic future of the Central Business District are somewhat questionable at this moment because of major new shopping centers being developed. Some programs to revitalize the Central Business District have been instituted, but these are still in the planning stage. Some potential industrial land is available along the river.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	211.5
Commercial	60.6
Industrial	170.8
Public & Semi-Public	110.9
Public R.O.W.	244.4
Vacant Land	3.9

Vacant: 3.9 (Total)

<u>Not Zoned (In County)</u>	<u>Zoned (In City)</u>	
None	<u>Area</u>	<u>Use</u>
	A	A 2.0
	C	B .2
	C	C .8
	C	GC .7
	D	1 St Ind. .2

UNIT #8

1950 Population	0	Area	557.4 acres
1960 Population	746		
1961 Population	803	O-D Zones	7201, 7202
1964 Population	1,254		& acres not
1969 Population	3,999		in zones.
1974 Population	5,020		
1979 Population	6,041		
1981 Population	6,449		

This unit contains new high-quality residential development and a Country Club and Golf Course. Rapid new development is expected within this unit. Approximately 40-50 acres of low ground will need storm sewerage and a problem exists because some of it is lower than the river in flood stages. All land in the City is expected to develop soon and County land in the Montana Addition (111 acres) is to be annexed and is developable.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	88.4
Commercial	2.0
Industrial	7.5
Public & Semi-Public	199.5
Public R.O.W.	68.7
Vacant Land	191.3

Vacant: 191.3 (Total)

Not Zoned (In County)  
Residential - 95.5

<u>Zoned (In City)</u>		
<u>Area</u>	<u>Use</u>	
A	A	44.8
C	C	1.8
C	LB	11.8
Undev. Parks		15.8
Undev. Streets		21.6

UNIT #9

1950 Population	179	Area	688.0 acres
1960 Population	325		
1964 Population	414	O-D Zone	7001
1969 Population	945		
1974 Population	945		
1979 Population	945		
1981 Population	945		

This unit was damaged during the recent flood. It contains mixed land use, is cut up by major roadways, and has poor access. Some trailer housing exists in the area. Some new housing has been built immediately east of the Airport, and these homes are separated from the City by the new freeway. Airport noise will probably inhibit new residential growth. There is limited potential for new growth in this unit. It is possible that a flood-control project may consume some land in this unit.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	43.5
Commercial	4.7
Industrial	13.2
Public & Semi-Public	0.0
Public R.O.W.	97.6
Vacant Land	529.0

Vacant: 529.0 (Total)

Not Zoned (In County)  
Agricultural - 398.9

<u>Zoned (In City)</u>		
<u>Area</u>	<u>Use</u>	
A	A	18.3
A	B	6.3
A	Sub	71.9
C	LB	8.4
Undev. Parks		7.9
Undev. Streets		14.1
Undev. Alleys		3.2

UNIT #10

1950 Population	4,986	Area	1,132.6 acres
1960 Population	7,201		
1964 Population	7,284	O-D Zones	6601-6613
1969 Population	7,284		
1974 Population	7,412		
1979 Population	7,412		
1981 Population	7,412		

This unit contains a mixture of uses and much sub-standard residential development. There is good potential in the northern and southern portions for future industrial growth in this unit, with excellent truck and railroad access available. The North-west Truck Bypass lies along the northern side of this unit. A very limited amount of new residential growth can be expected in this unit. A moratorium is in effect on new residential development and plats pending flood-control work.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	371.9
Commercial	14.9
Industrial	270.7
Public & Semi-Public	28.0
Public R.O.W.	213.3
Vacant Land	233.8

Vacant: 233.8 (Total)

<u>Not Zoned (In County)</u>
Industrial - 29.5
Residential - <u>3.5</u>
33.0

<u>Zoned (In City)</u>		
<u>Area</u>	<u>Use</u>	
A	A	8.0
A	B	3.6
A	Sub	9.7
B	A	8.6
B	B	6.2
B	C	.4
C	B	4.3
C	LB	.1
D	GC	15.1
D	1 St Ind.	131.6
D	LB	10.3
Undev. Parks		2.9



UNIT #11

1950 Population	1,227	Area	779.3 acres
1960 Population	1,844		
1964 Population	1,750	O-D Zones	6901-6902
1969 Population	1,800		
1974 Population	1,800		
1979 Population	1,800		
1981 Population	1,800		

The residential development in this unit is of better quality than in Unit #10. The Planning Board has instituted moratoriums on future platting and building in this unit as it is floodable under present conditions. Only very limited future residential construction is expected in this unit. Access provided by the freeway may encourage light-industrial development along the railroad tracks in the north end of this unit.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	334.6
Commercial	18.8
Industrial	5.8
Public & Semi-Public	8.5
Public R.O.W.	173.5
Vacant Land	238.1

Vacant: 238.1 (Total)

<u>Not Zoned (In County)</u>	<u>Zoned (In City)</u>		
Residential - 148.8	<u>Area</u>	<u>Use</u>	
	A	Sub	80.6
	Undev. Parks		2.5
	Undev. Streets		6.2

UNIT #12

1950 Population	250	Area	936.0 acres
1960 Population	365		
1964 Population	969	O-D Zones	6201-6202
1969 Population	1,417		
1974 Population	2,921		
1979 Population	4,677		
1981 Population	5,291		

A moderate amount of new residential growth has occurred in this unit, and is expected to continue. A steep hill has limited development to the north, but the new "high-level" water district will make water available to the northern portion of this unit, and encourage new development. This is considered a good long-range residential area.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	83.0
Commercial	2.4
Industrial	8.3
Public & Semi-Public	15.2
Public R.O.W.	37.0
Vacant Land	790.1

Vacant: 790.1 (Total)

Not Zoned (In County)  
Agricultural - 737.8

Zoned (In City)

<u>Area</u>	<u>Use</u>	
A	A	16.6
B	A	10.6
C	C	3.4
D	GC	.8
Undev. Streets		13.0
Undev. Alleys		1.6
Undev. Parks		6.3

UNIT #13

1950 Population	125	Area	595.8 acres
1960 Population	794		
1964 Population	808	O-D Zones	6701-6706
1969 Population	808		
1974 Population	1,326		
1979 Population	1,812		
1981 Population	2,007		

This unit contains residential development, the new Charles Russell High School, and a stockyards, which inhibits residential development nearby. There is some chance that the stockyards will be removed, leaving very desirable residential land. There is some good potential industrial land served by both rail and truck access, and the improvement of the U.S. 87 Bypass and construction of the new Northwest Bypass will attract more commercial-industrial activity.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	36.0
Commercial	9.7
Industrial	144.7
Public & Semi-Public	151.0
Public R.O.W.	35.3
Vacant Land	219.1

Vacant: 219.1 (Total)

<u>Not Zoned (In County)</u>		
Industrial	-	78.3
Residential	-	92.6
		<u>170.9</u>

<u>Zoned (In City)</u>		
<u>Area</u>	<u>Use</u>	
A	A	3.7
B	GC	4.3
D	1 St Ind.	32.6
Undev. Parks		.3
Undev. Streets		7.3

UNIT #14

1950 Population	109	Area	1,149.5 acres
1960 Population	2,098		
1961 Population	4,032	O-D Zones	6301-6305
1964 Population	4,213		
1969 Population	7,464		
1974 Population	10,936		
1979 Population	14,376		
1981 Population	15,752		

This unit is the most active new residential area in the City, and it should continue. More land is available for development, and no utilities problem exists. A new shopping center is in operation, and the unit also contains the Phillips Industrial Plant. More industrial land is available for development within the unit.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	271.5
Commercial	21.0
Industrial	11.6
Public & Semi-Public	53.2
Public R.O.W.	171.0
Vacant Land	621.2

Vacant: 621.2 (Total)

Not Zoned (In County)  
Residential - 524.8

<u>Zoned (In City)</u>		
<u>Area</u>	<u>Use</u>	
A	A	79.3
C	C	3.8
D	GC	2.3
Undev. Parks		7.0
Undev. Streets		4.0



UNIT #15

1950 Population	1,449	Area	864.8 acres
1960 Population	1,589		
1964 Population	1,660	O-D Zones	6801 & parts
1969 Population	1,660		of 6401 &
1974 Population	1,718		6501
1979 Population	1,776		
1981 Population	1,800		

This area is occupied by the Anaconda Complex, and Black Eagle. There is scattered mixed development in the unit. A high-level water district will make water available to the area, but only limited future residential growth is expected. There is some light industrial potential in this unit.

<u>Land Use: (In Acres)</u>	<u>1964</u>
Residential	51.2
Commercial	18.8
Industrial	497.8
Public & Semi-Public	6.0
Public R.O.W.	56.1
Vacant Land	234.9

Vacant: 234.9 (Total)

<u>Not Zoned (In County)</u>		<u>Zoned (In City)</u>	
Residential	- 98.9	Undev. Streets	1.6
Agricultural	- <u>133.9</u>	Undev. Alleys	.5
	232.8		

UNIT SF4

1950 Population	0	O-D Zones	7101-7102
1960 Population	0		
1964 Population	28		
1969 Population	1,058		
1974 Population	2,037		
1979 Population	3,016		
1981 Population	3,409		

A new residential subdivision is developing within this unit. It is pending annexation to the City. The site is on a hillside overlooking the City, and with the installation of utilities, paved streets and city services, it should develop rapidly. The area is bounded to the west by the new freeway and the airport, but because of the topographic difference, it is not adversely affected.

# RESIDENTIAL LAND USE PROJECTIONS

Unit	O-D Zone	Survey				Area Added Projections												Total Pop.
		1 9 6 4				1 9 6 9			1 9 7 4			1 9 7 9			1 9 8 1			
		Net Res. Acres	Gross Res. Acres	Pop.		Gross Res. Acres	Gross Res. Acres	Pop.	Gross Res. Acres	Gross Res. Acres	Pop.	Gross Res. Acres	Gross Res. Acres	Pop.	Gross Res. Acres	Gross Res. Acres	Pop.	
1	7701																	
	7702																	
	7703	66.2	96.7	1,055														2,721
	7704	194.6	256.0	1,029		99.1	1,110	694	62.1	37.9	426	694	24.8	15.2	170	446.1	3,161	
		260.8	352.7	2,084		451.8	3,194	4,314	551.8	651.8	5,434	5,882	691.8	5,882	691.8	5,882	5,882	
2	7901	58.3	79.0	400		54.0	605	64	5.7	5.7	64	64	2.3	2.3	26	146.7	1,159	
	7902	93.0	142.4	1,398		18.1	202	125	11.2	11.2	125	125	4.6	4.6	51	187.5	1,901	
	7903	91.9	130.9	1,980												130.9	1,980	
	7904	90.4	127.5	1,862												127.5	1,862	
		333.6	479.8	5,640		551.9	6,447	6,636	568.8	585.7	6,825	6,902	592.6	592.6	6,902	592.6	6,902	
3	8101																	
	8102	8.9	15.4	387		68.5	768	208	18.6	18.6	208	208	7.5	7.5	83	128.6	1,654	
	8103	43.6	67.8	667												67.8	667	
	8104	.8	1.1			16.9	189								18.0	189	189	
	8105	53.3	84.3	1,054		169.7	2,011	829	73.9	354.7	829	829	29.5	391.7	330	177.3	1,988	
															4,498	391.7	4,498	
4	7501																	
	7502																	
	7503																13	
	7504	100.0	162.0	2,263		2.9	32									164.9	2,295	
	7505	93.7	152.0	2,272		1.1	13									153.1	2,285	
	7506	97.3	157.9	1,986		.8	10									158.7	1,996	
	7507	74.1	120.0	1,548		.5	6									120.5	1,554	
	7508																	
	7509	73.6	119.2	1,567												119.2	1,567	
	7510	77.3	112.0	1,397		2.3	26									114.3	1,423	
	7511																	
	7512	516.0	823.1	11,046		830.7	11,133	11,133	830.7	830.7	11,133	11,133	830.7	830.7	11,133	830.7	11,133	

Unit	O-D Zone	Survey			Area Added Projections											
		1 9 6 4			1 9 6 9			1 9 7 4			1 9 7 9			1 9 8 1		
		Net Res. Acres	Gross Res. Acres	Pop.	Gross Res. Acres	Pop.	Gross Res. Acres	Gross Res. Acres	Pop.	Gross Res. Acres	Pop.	Gross Res. Acres	Pop.	Gross Res. Acres	Pop.	Total Pop.
5	7401	3.7	6.0	47										6.0	47	
	7402	5.0	7.5	99										7.5	99	
	7403	68.3	110.8	2,534										110.8	2,470	
	7404	69.7	113.0	1,979										113.0	1,979	
	7405	65.6	106.3	1,787										106.3	1,787	
	7406	1.1	1.8	49										1.8	49	
	7407	45.8	74.3	1,658										74.3	1,602	
	7408	56.4	91.4	1,381										91.4	1,381	
	7409	61.3	99.4	1,291										99.4	1,291	
	7410	56.7	92.0	1,670										92.0	1,610	
	7411	65.5	106.2	1,619										106.2	1,619	
	7412	62.5	101.3	1,466										101.3	1,466	
		561.6	910.0	15,580	910.0	15,580	910.0	15,505	910.0	15,430	910.0	15,400	910.0	15,400	15,400	
6	7313	21.2	34.4	260										34.4	260	
	7413	7.9	29.3	670										29.3	670	
	8001	106.7	141.2	1,087	58.4	653	358	46.8	358	358	18.7	362	311.9	2,818		
	8002	31.3	53.2	289										53.2	289	
	8003	116.3	188.5	2,744										252.8	3,463	
	8004	283.4	446.6	5,050	505.0	5,703	6,362	578.6	652.2	7,021	681.6	7,500	681.6	7,500		
	7301	1.2	1.9	44										1.9	44	
	7302	2.6	3.9	28										3.9	28	
	7303	34.4	56.5	2,165										56.5	1,899	
	7304	58.4	94.6	2,471										94.6	2,171	
	7305															
	7306	2.6	4.2	244										4.2	214	
	7307															
	7308	.9	1.5	931										1.5	831	
	7309	3.1	5.3	291										5.3	256	
	7310	1.5	2.4	249										2.4	249	
	7311	38.5	62.4	1,634										62.4	1,434	
	7312	68.4	110.9	2,674										110.9	2,374	
		211.6	343.6	10,731	343.6	10,372	10,011	343.6	343.6	9,650	343.6	9,500	343.6	9,500	9,500	

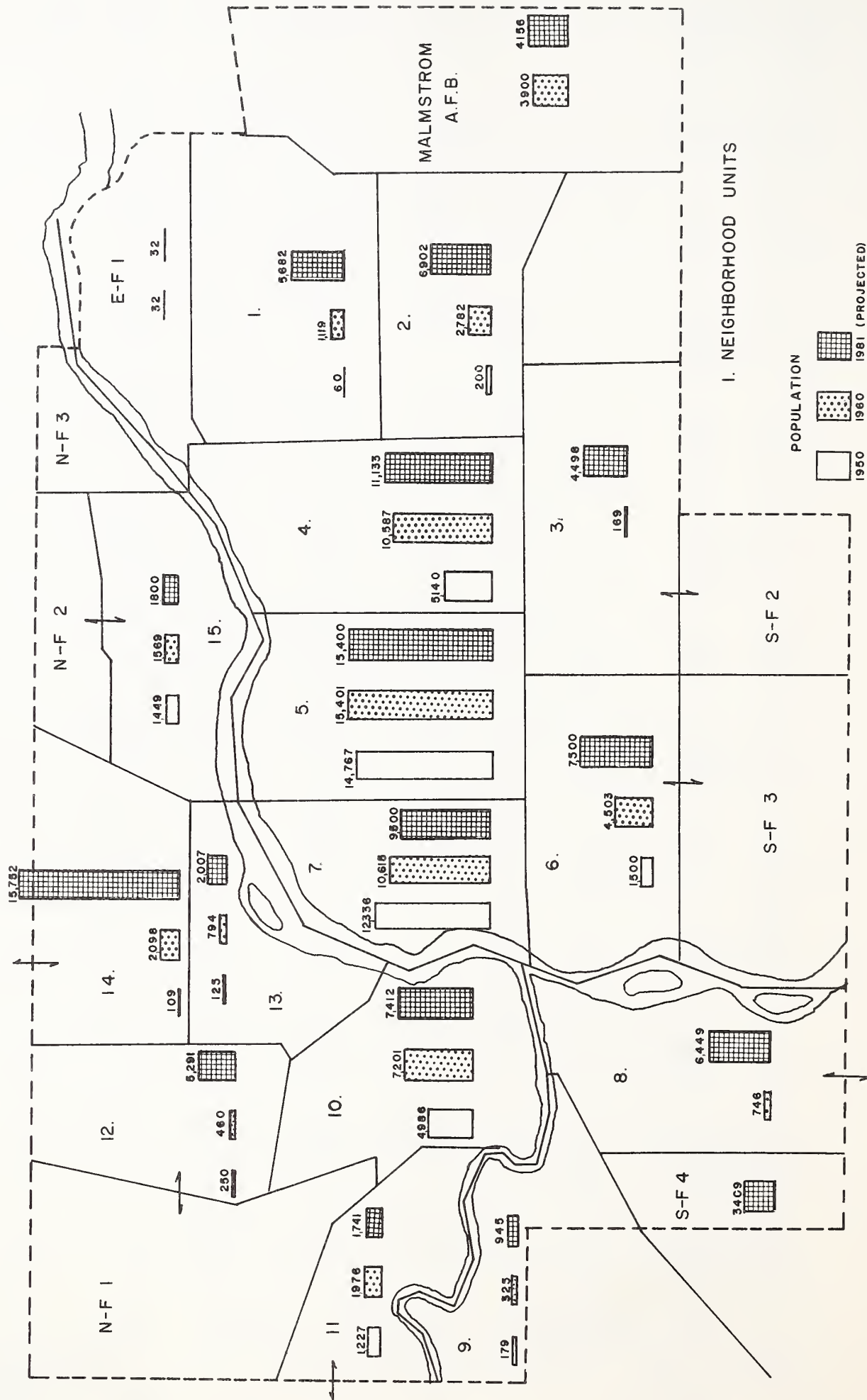




Unit	O-D Zone	Survey						Area Added Projection					
		1 9 6 4			1 9 7 4			1 9 7 9			1 9 8 1		
		Net Res. Acres	Gross Res. Acres	Pop.	Gross Res. Acres	Pop.	Gross Res. Acres	Gross Res. Acres	Pop.	Gross Res. Acres	Gross Res. Acres	Pop.	Total Pop.
13	6701	33.0	49.5	719		32	2.9				52.4	751	
	6702												
	6703	3.0	4.5	89							4.5	89	
	6704												
	6705												
	6706												
		36.0	54.0	808		808	100.4	1,326	1,812	161.3	161.3	2,007	2,007
14	6301	11.3	16.9	69			127.6	1,430	1,430	51.2	573	6,753	
	6302	99.1	131.3	1,529			179.5	2,010	2,010	71.8	803	6,352	
	6303	161.1	209.5	2,615			2.9	32				212.4	2,647
	6304												
	6305												
		271.5	357.7	4,213		4,213	957.9	10,936	14,376	1388.0	15,752	1388.0	15,752
15	6801	46.1	66.5	1,589			5.1	58	58	2.2	24	78.9	1,729
	6401	2.5	3.8									3.8	
	6501	2.6	3.9	71								3.9	71
		51.2	74.2	1,660		1,660	79.3	1,718	1,776	86.6	1,800	86.6	1,800
SF4	7101	2.1	3.2	28			42.7	477	477	17.2	192	105.8	1,174
	7102						44.9	502	502	18.1	201	199.8	2,235
		2.1	3.2	28		28	182.7	2,037	3,016	305.6	3,409	305.6	3,409
TOTALS		3502.5	5315.2	69,565		69,565	6356.9	80,825	101,433	8684.5	105,680	8684.5	105,680
Total													
By Period							1041.7	11,260	971.5	10,304	971.4	10,304	4,247

# GREAT FALLS

## URBAN TRANSPORTATION STUDY AREA



Business and Commercial Land Use Projections

The study and projections of business land use was done on an area-by-area basis, utilizing the following information:

1. Existing uses and vacant areas from the 1964 land use survey.
2. The gross areas expected to be utilized in the future, from the economic study, and projections of consumer buying power.
3. Increased business land area per unit of floor area, because of newer trends of shopping center design and increased parking area ratios. Several publications about shopping center design were utilized.
4. A review of the trends in the Central Business District, as commented upon in the economic study.
5. A review of the growth along 10th Avenue South, both existing and proposed.
6. A review of existing and proposed shopping centers in other locations, incorporating all information available from developers and the economic survey interviews.
7. A review of planned roadway improvements, where increased potential for business land usage is expected.
8. A study of newly-developing residential areas, where need for new neighborhood shopping centers will exist when population and buying power are high enough.
9. A review of zoning maps - (a) County zoning as it existed prior to the adverse Court decision, (b) new County zoning as recently proposed by the Planning Board staff, and (c) existing City zoning.

General comments on growth factors by each Neighborhood Unit are made in the previous section. Generally, the areas shown for expected development in the 1964-69 stage are those areas where development is now underway or where firm plans have been announced.

The following table gives the O-D Zones where business development is expected to occur, by gross acres, for each of the stage periods. These are illustrated on the 1981 Land Use Plan.



BUSINESS & COMMERCIAL LAND USE PROJECTIONSGROSS ACRES ADDED TO O-D ZONES BY STAGE PERIODS

<u>Zone</u>	<u>1964-69</u>	<u>1969-74</u>	<u>1974-79</u>	<u>1979-81</u>
6102			4.4	2.0
6202			1.5	.5
6302	5.2	5.2	5.2	2.1
6601			4.0	1.8
6602			3.5	1.0
6702	3.5	3.8		
6703	18.0	11.0	7.0	3.0
6705	2.0	2.1		
6902		2.0	1.3	.7
7201		3.0	2.3	1.7
7204		4.0	3.4	2.6
7413	5.0	2.9		
7414	2.5	2.0		
7513			1.4	1.4
7703			2.7	.7
7901			4.0	1.6
7902	28.0	27.0	30.5	7.3
7903		.3	.2	.2
8002	7.0	4.5		
8102	4.8	3.8	2.8	1.9
8103	2.5	2.0		
8104	<u>15.0</u>	<u>4.0</u>	<u>3.4</u>	<u>2.6</u>
Total Acres	93.5	77.6	77.6	31.1

### Industrial Land Use Projections

The study and projections of industrial land use were done on an area-by-area basis, following most of the same general information items as listed in the section on business land projections.

Most of the Great Falls industries were contacted by personal interviews or letter questionnaires, and specific information on expansion plans was often available.

The gross acres of industrial land use expected to be added were computed from the economic study, on the basis of projected industrial employment. An increased allotment of industrial land was made because of modern trends of increased land usage through one-level plant design and increased areas for parking and loading.

As in the study of business land, local knowledge of specific plans of developers was utilized, along with considerations of rail and truck access, utilities, availability of level land, and relationship to existing industry.

The following table gives the O-D Zones where industrial development is expected to occur, by gross acres, for each of the stage periods. These are illustrated in the 1981 Land Use Plan.

INDUSTRIAL LAND USE PROJECTIONSGROSS ACRES ADDED BY O-D ZONE

<u>Zone</u>	<u>Total Acres</u>	<u>1964-69</u>	<u>1969-74</u>	<u>1974-79</u>	<u>1979-81</u>
6102	14.0	4.1	4.1	4.1	1.7
6103	30.0	8.9	8.9	8.9	3.3
6302	4.0	1.2	1.2	1.2	.4
6401	20.0	5.9	5.9	5.9	2.3
6501	20.0	5.9	5.9	5.9	2.3
6601	5.0	1.5	1.5	1.5	.5
6607	6.0	1.8	1.8	1.8	.6
6610	25.0	7.4	7.4	7.4	2.8
6611	14.0	4.1	4.1	4.1	1.7
6703	12.0	3.5	3.5	3.5	1.5
6704	25.0	7.4	7.4	7.4	2.8
6705	5.0	1.5	1.5	1.5	.5
6801	2.0	.6	.6	.6	.2
6901	35.0	10.4	10.4	10.4	3.8
7001	6.0	1.8	1.8	1.8	.6
7306	6.0	1.8	1.8	1.8	.6
7401	3.0	.9	.9	.9	.3
7402	20.0	5.9	5.9	5.9	2.3
7501	25.0	7.4	7.4	7.4	2.8
7602	65.0	19.3	19.3	19.3	7.1
7701	238.0	70.0	70.0	70.0	28.0
7702	55.0	16.3	16.3	16.3	6.1
8001	<u>6.0</u>	<u>1.8</u>	<u>1.8</u>	<u>1.8</u>	<u>.6</u>
	641.0	189.4	189.4	189.4	72.8

Public and Semi-Public Land Use Projections

Personal interviews were conducted with the Public Schools, Parochial Schools, Great Falls College, the Hospitals, Libraries, Airport, Fire Department, Water Department, and Public Parks and Recreation Departments regarding their plans for new and improved facilities. Several reports were also reviewed. Information gained has all been mapped, showing existing and proposed sites for the following facilities:

1. Public Schools, by type
2. Parochial Schools
3. Great Falls College
4. Libraries
5. Parks
6. City Water Reservoirs and Other Property
7. Fire Stations
8. Airport Additions
9. Swimming Pools
10. Hospitals
11. Deaf and Blind School
12. Orphan's Home and School

These sites and facilities are shown on the 1981 Land Use Plan by color code and symbols.

















